1.0 Need for Project

"Differences hold great opportunities for learning. Differences offer a free, abundant, and renewable resource. I would like to see our compulsion for eliminating differences replaced by an equally compelling focus on making use of these differences to improve schools" (Barth, 1990, pp. 514-515). At no time in the education of students with disabilities has there been a greater emphasis on their academic success and the use of research-based practices to achieve this outcome. Nationally, schools are critically examining their practices, seeking strategies that will be effective in helping students who have traditionally not met with academic success to perform at higher levels. There is a growing recognition that schools simply lack the flexibility to accommodate the diverse abilities and interests of a heterogeneous student body (Cuban, 1989). Advocates of school reform speak of attending to the margins, focusing on the needs of students who have traditionally been separated out into special programs; unlabeled yet unsuccessful students in the regular classroom; students who come from families that do not speak English; and high performing students who push the margin in the other direction. "*These students constantly challenge the equilibrium and boundaries of the classroom, and their diversity calls out for the school to change. They are engines of reform*" (Burrello, Lashley & Beatty, 2001, pg. 2).

Schools are retooling, shifting from piecemeal efforts to "fix individual parts" to comprehensive plans that bring together previously disconnected educational initiatives into an aligned and organized effort to improve outcomes for all students (McLaughlin, 1998). A variety of models have emerged to guide comprehensive school improvement efforts that address the needs of students with disabilities (e.g., Ferguson, Kozleski & Smith, 2001; McRel, 2000; Roach, Salisbury & McGregor, 2002). While differing in terminology, each model encompasses professional development, emphasizing curricular and instructional practices to support learning among diverse students, as a foundational component of successful school change.

A comprehensive analysis of stakeholder input, state data, state performance requirements, Title I and Title II initiatives, and the relevant research was undertaken to identify and prioritize Montana's professional development needs specific to promoting the academic success of students with disabilities. [See Appendix C for a complete listing of the groups providing input in the development of this proposal.] A synthesis of the information gained from this analysis is presented in the remainder of this section, leading to the identification of gaps and weaknesses the proposed project will address. A brief overview of Montana and its educational services and structures precedes this discussion, establishing a context for the remainder of the proposal.

1.1 The Demographics of Montana and its Schools

According to the most recent census (U.S. Census Bureau, 2000), 902,195 people live in Montana. If this population were scattered evenly across the state, only six Montanans would live in each square mile, and only one of them would be a K-12 student (Nielson, 2001). The

actual population distribution is quite different. Approximately half the population live in large towns or cities in the western and southern part of the state; the other half live in small towns and rural communities of less than 2,500 people. Forty-seven of Montana's fifty-six counties meet Popper's (1986) definition of "the American frontier" (i.e, counties with fewer than six person per square mile).

Montana is home to seven Indian reservations and 12 distinct tribal groups. Although 6% of Montana's population is American Indian, American Indians comprise over 14% of the state's K-12 students. One-half of Montana's American Indian population is clustered around seven reservations, while the remaining half live in the state's urban areas.

Other statistics about Montana schools and its students are summarized in Table 1. In addition, several maps are provided in Appendix D to illustrate features of the state's geography and demographics. Collectively, this information paints the picture of a large, sparsely populated state with many small relatively poor schools. Two-thirds of the state's school population attend schools that enroll fewer than 200 students. While Montana ranks well above the national average in total taxable resources spent on education (4.5%), it ranks 42nd on a spending index which reflects the number of students who are in districts spending at least the national average per pupil (Skinner, 2005). Teacher salaries are similarly low. Montana ranks 47th nationally when average teacher salaries are compared across states, and 51st nationally when ranking is based on average actual beginning teacher salaries (AFT, 2004).

Table 1: Demographics of Montana and Its Schools

About Montana		About Montana's School Population	
Population[1]	920,195	Number of PreK-12 Students[2]	148,356
Size in square miles	147,138	Percent of Minority Students[2]	14.9%
Number of School Districts[2]	450	Percent of Children in Poverty	19%
Number of Schools[2]	859	Percent of Students with Disabilities	12.8%
Number of Public School Teachers[2]	11,985	Percent of English-Language Learners	4.4%
Median Income[1]	$34,375		

[1]Census and Economic Information Center, 2005;[2]OPI, 2004

There are two major university systems in the state: The University of Montana (UMT) and Montana State University (MSU). Both offer teacher training programs for general educators at the undergraduate and graduate levels, and have campuses in several locations. The MSU campus in Billings (MSU-B) offers coursework in special education at the bachelor's and master's level, while the UMT-Missoula campus offers an endorsement in special education that can be earned at the undergraduate or graduate level, as well as graduate coursework in special education that can be an identified area of concentration in a master's degree. Across university systems, there is an extremely limited range of course specialization options because student enrollment cannot sustain substantial levels of differentiation. A successful cross-university collaborative program to offer graduate specialization in the area of low incidence disabilities has been in place for approximately seven years. This program enables graduate students to participate in a distance education program taught by faculty from both universities, and to enroll

at the university where they prefer to pursue their program. Thus, teachers throughout the state have access to specialized coursework about low incidence, but the responsibility of delivering the program is shared across the two systems. A second federally funded grant, focused on the needs of students with high incidence disabilities, will begin offering coursework this summer, using the same cross-university collaborative model.

*The demographics and geography of Montana necessitate the effective use of distance technologies and other collaborative efforts within regions in order to effectively use resources***.** *Personnel preparation and professional development initiatives must draw upon the expertise and resources of multiple agencies*.

1.2 Access to the General Education Curriculum for Students with Disabilities

Introducing a recent publication about supporting access to the general education curriculum for students with disabilities, the Executive Director of the National Association of Elementary School Principals wrote:

> *There is probably no other issue that will engender such strong emotions for teachers and administrators than the challenge of making the school's general curriculum accessible for students with disabilities. For too long "regular" educators and "special" educators have been embroiled in an us-them debate as to whose responsibility it is to provide instructional services for students with disabilities* (Nolet & McLaughlin, 2000, pg. xvi).

The phrase "access to the general education curriculum" first appeared in the regulations to the 1997 Amendments of IDEA. The statutory language of IDEA 1997 stated that educational services, supports, modifications, and goals should ensure that student *progress* in the general curriculum. Since that time, special educators have been struggling to understand and implement this concept. Basic questions such as "*how*?" and "*where*?" is access to the general curriculum achieved are the focus of considerable discussion in the professional literature (e.g., Fisher & Frey, 2001; Ford, Davern & Schnorr, 2001; McLaughlin et al., 1999; Nolet & McLaughlin, Wehmeyer, Sands, Knowlton & Kozleski, 2002). The graphic in Figure 1 depicts the "new" model of special education, one in which services and supports provide a student access to the general education curriculum.

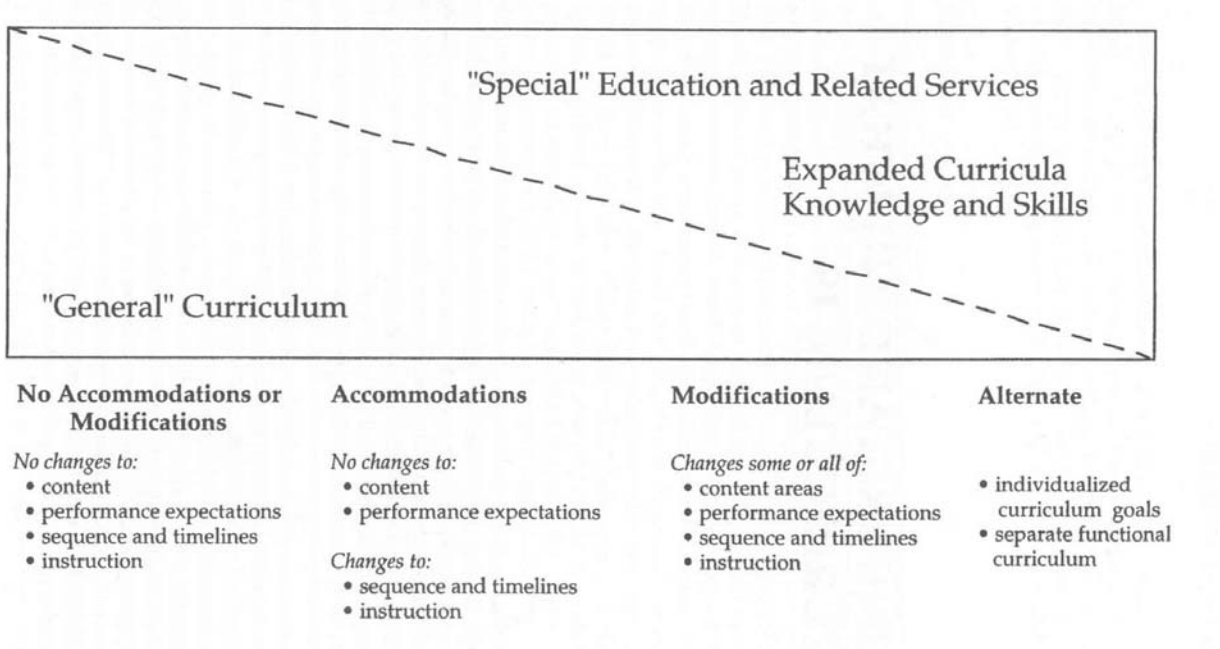


Figure 1: Special Education and the General Education Curriculum (Nolet & McLaughlin, 2000, pg. 13).

For many years prior to this federal requirement, mainstreaming and inclusion have focused attention on the placement and support of students with disabilities in the regular education classroom. Research related to these efforts has shown that many teachers, both special and general educators, feel unprepared to address the needs of students who learn in a different way or at a different pace (e.g., Goodland & Field, 1993; Reynolds, 1995; Williams, 1990). Despite the various models of collaboration between special and general educators that have emerged to support students with disabilities in general education settings (e.g., Idol & West, 1987; Johnson et al., 1988; West & Idol, 1987), many teachers continue to (a) plan instructional lessons for the whole class without considering the needs of individual students (Vaughn & Schumm, 1994); (b) rely heavily on large group instruction, rather than differentiating instruction based on individual needs of students (Baker & Zigmond, 1990; McIntosh et al., 1994); (c) rate instructional adaptations as more desirable than they are feasible (Schumm & Vaughn, 1991); and (d) prefer pull-out special education programs (Coates, 1989; Semmel et al., 1991).

In more recent dialogues about involving students with disabilities in standards-based reform, researchers report that special education teachers question how a student who has already failed in one or more areas of the general curriculum can be expected to participate in "grade level" instruction (McLaughlin, 2000). Some teachers of students with more significant disabilities feel this does not apply to "their" students (Agran, Alper & Wehmeyer, 2002), expressing a perceived tension between standards-based instruction, functional skills, and *individual* education plans.

Congressional findings that introduce the newly reauthorized IDEIA Amendments of 2004 add some clarity to the concept of access to the general education curriculum, particularly relative to the "*where*?" question. This language discusses access to the general education curriculum **in the regular classroom** [Sec. 601(c)(5)(A)], encouraging the alignment of efforts focused on students with disabilities with Title I initiatives so that supports can benefit a wider range of students. The "*how*" question is addressed by recommending that special education and related services, aids, and supports should be delivered in the regular classroom whenever appropriate. Special education is clearly intended to be a service, not a place [Sec. 601(c)(5)(c,d)]. *Professional development efforts are needed to support general and special educators to shift from the conception of special education as a physical place, to one of a flexible set of services that enable students with disabilities to access the general education curriculum in a manner that is consistent with their individual skills and needs.*

Fortunately, there is a considerable body of available research to guide schools to move in this direction. The remainder of this discussion highlights the specific strategies that emerged in the planning and prioritization of initiatives for this project.

1.2.1 Effective Instructional Design and Delivery Practices

Differentiated instruction (DI) was highlighted in a major initiative of Montana's State Improvement Grant (SIG) during the last five years. It is recognized as a structured and effective approach to help teachers move from the "one size fits all" classroom to one that is responsive to students' varying readiness levels, interests, and learning profiles. Critical characteristics of such classrooms are described in detail in Appendix E. In a classroom using DI, all students focus on

the same key concepts, principles, and overall curriculum objectives, but their instructional path varies based on individual needs. As described by (Tomlinson, 1999, pg. 16), *"Students can take different roads to the same destination."*

Based on the work of Vygotsky (1978), differentiated instruction is grounded in the "zone of proximal development" theory. This theory suggests that the difficulty of skills taught should be just slightly in advance of a learner's current mastery level. Since students in a classroom are at very different mastery levels, a flexible approach to instruction is required. District case studies link the use of differentiated instruction to what has been described as "customized services" (Lezotte & Pepprl, 1999) for students. In one example, (McAdamis, 2001), a Missouri district reported significant decreases in the number of students scoring in the lowest achievement levels after large-scale adoption of this approach to instruction. One teacher commented, *"I really feel I'm providing a learning opportunity that is matched to the academic ability of my students. ...I know that all of my students are learning and understanding the key concepts and skills at a level suitable for them*" (McAdamis, 2001, pg. 2).

Across the 5 year projects of Montana's SIG, over 80 schools were introduced to the philosophy and strategies associated with DI under the umbrella of the We Teach All project. Substantial accomplishments were made in introducing this innovation to a large number of schools, but much more remains to be done. *There is strong need to build upon the successes of this current statewide initiative. Many schools are positioned to move to higher levels of implementation and would benefit from additional forms of professional development to support*

their efforts while other schools, particularly at the secondary level, need to be introduced to these approaches.

While not part of the original We Teach All professional development focus, universal design for learning (UDL) (Rose & Meyer, 2000) has emerged as a second and highly compatible instructional strategy to improve access to the general education curriculum for students with disabilities. Inspired by the universal design concept in architecture (Pisha & Coyne, 2001), the UDL framework has been developed by The Center for Applied Special Technology (CAST) to assist teachers in developing curricula that are flexible and supportive of all students. Traditional materials, particularly printed text, present substantial barriers that limit access to information and learning for many students. Students with limitations in sight, decoding, attention, and/or comprehension of text face serious impediments in their efforts to access the traditional general education curriculum. A UDL curriculum is designed to be flexible, "*taking on the burden of adaptation so that the students doesn't have to*" (Hall, Strangman & Meyer, 2005, pg. 6).

Grounded in brain research, UDL principles (See Table 2) align 3 fundamental learning components with 3 learning networks in the brain: *recognition*, *strategy*, and *affect* (Rose & Meyer, 2002). A UDL model guides teachers to instructional goals, methods, assessment, and materials to minimize learning barriers and maximize flexibility. Examples of such methods are described in Table 3.

Table 2: Principles of a UDL Learning Framework (Hall et al., 2005)

Principle 1: To support *recognition learning*, provide multiple, flexible methods of presentation.
Principle 2: To support *strategic learning*, provide multiple, flexible methods of expression and apprenticeship.
Principle 3: To support *affective learning*, provide multiple, flexible options for engagement.

This focus on flexibility is highly compatible with the practices of DI, and there is considerable value in drawing upon both perspectives to "frontload" (Heron & Jorgensen, 1995) flexibility into the curriculum rather than using the time of special education teachers to "retrofit" lesson plans to accommodate students with disabilities. Two examples of lessons planned with a combination of UDL teaching methods and practices associated with differentiated instruction are provided in Appendix F. *In efforts to expand the scale and degree of implementation of differentiated instruction in Montana classrooms, there is need to draw upon the methods of universal design as a method of reducing barriers that limit access to the general education curriculum for students with disabilities.*

Table 3: Teaching Methods that Support UDL Curricula (Hall et al., 2005)

To support diverse *recognition* networks:	ιProvide multiple examples ιHighlight critical features ιProvide multiple media and formats ιSupport background context

To support diverse *strategic* networks:	ιProvide flexible models of skilled performance ιProvide opportunities to practice with supports ιProvide ongoing, relevant feedback ι Offer flexible opportunities for demonstrating skill
To support diverse *affective* networks	ιOffer choices of context and tools ιOffer adjustable levels of challenge ιOffer choices of learning context ιOffer choices of rewards

1.2.2 Research-Based Reading and Literacy Practices

Nationally, there has been a concerted effort to focus resources and expertise on working with children from the earliest ages to develop reading and literacy skills. There is a large and compelling body of research indicating that students who begin as unsuccessful readers in the first grade remain poor readers in the fourth grade (Good, Simmons, & Smith, 1998; Torgesen, 1998). This gap continues to increase across the school years (Felton & Pepper, 1995), persisting through adulthood (Juell, 1988; LaBuda & DeFries, 1988; Schonhaut & Satz, 1983). National performance data from 1992 to 2003 indicate that the percentage of this country's 4th grade students who read below a basic level has ranged between 36% and 40% (U.S. Department of Education, 2004), providing evidence that remediating reading difficulties becomes increasingly challenging beyond the third grade (Fletcher & Foorman, 1994).

In response, national reading initiatives (Reading Excellence, followed by Reading First) have provided substantial resources to states to provide intensive, research-based interventions to students in the early years of school. Montana received a Reading Excellence grant in 2001,

followed by a Reading First grant which began in the fall of the 2003-04 school year. Both programs target high need schools, providing them funds to create a comprehensive school-wide reading system. Montana's Reading First requires local education agencies (LEAs) to adopt scientifically-based reading research (SBRR) programs and scientifically based service delivery systems. Their system must address the 18 components delineated in Table 4 (Montana Office of Public Instruction, 2002). While all components are critical to an effective school-wide approach, those that speak directly to the needs of students with disabilities are **in bold.**

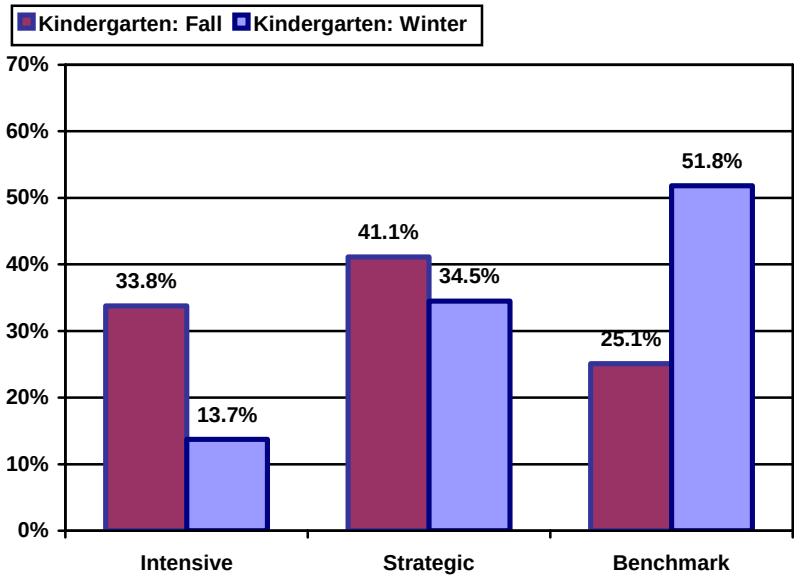
Table 4: Reading System Components Required of Reading First Schools
Implementing a Reading Leadership Team
Increasing staff collaboration and communication about reading
Creating a data collection and data analysis system
Selecting a research-based comprehensive reading program
Learning, using, and analyzing the comprehensive reading program
Creating flexible reading groups that maximize learning
Allocating sufficient time for reading classes
Protecting and maximizing reading class time
Assigning staff to maximize the learning of reading
Allocating instructional space for reading
Organizing and maximizing staff, mentoring, coaching, and training
Using in-class interventions for struggling readers based on data
Creating a system of school-wide reading interventions for struggling readers based on data
Implementing a system of problem solving for individual special reading needs of students to provide extended, additional support, and intervention

Table 4: Reading System Components Required of Reading First Schools
Enhancing administrative supervision and monitoring of reading instruction
Increasing parental involvement in reading
Enhancing reporting of reading progress to students, parents, and the public
Establishing school-wide reading rituals, traditions, and celebrations

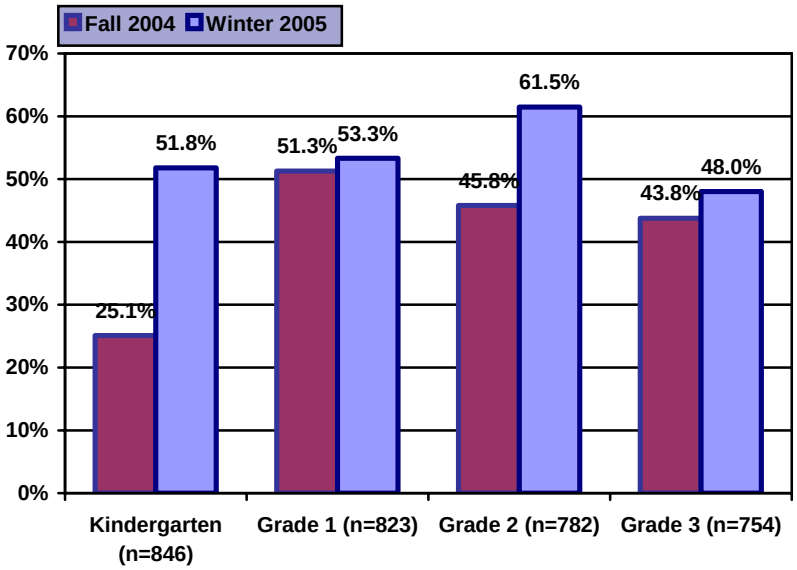
Reading First is truly a capacity building effort. Debbie Hunsaker, the Office of Public Instruction (OPI) Program Specialist who directs this project described the situation in Montana as follows in the state's application for funding:

> *We have discovered in Montana a wide spread lack of capacity at the trainer level in the implementation of scientifically-based reading research programs. It was difficult to locate enough experienced educators who could become on-site program trainers for our Reading Excellence schools. ....Reading First staff...will increase regional implementation training capacity by training regional SBRR specialists* (Montana OPI,, 2002 pg. 13).

Despite these challenges, a recent evaluation of the Montana Reading First program (Autio, 2005) shows positive outcomes to date across all grades assessed (K-3). Two summary graphs in Figure 2 illustrate these gains. Particularly encouraging is the large percentage of kindergarten children moving out of the intensive group and the corresponding increases in students performing within the strategies and benchmark groups.



Kindergarten ISRs, Fall 2004-Winter 2005 (n=846)



Percentage of Students at Benchmark on the DIBELS School Year to Date (Fall 2004-Winter 2005)

Figure 2: Reading First Second Year Evaluation Outcomes

While students with disabilities are represented in this data, it is not clear just how inclusive the data are in terms of the full range of students with disabilities that attend Reading First schools. Further, their performance was not disaggregated, making it impossible to know just how well this subgroup of students is doing as a result of this program.

It is reasonable to speculate that students with disabilities may be overrepresented in the intensive group of performers in the Reading First data. Research confirms that merely ensuring that students with disabilities receive the type and intensity of interventions associated with Reading First may not be sufficient to produce reading gains (Al Otaiba & Fuchs, 2002). Substantial effort has gone into identifying the characteristics of children who are unresponsive to intensive, early literacy intervention. Difficulties of struggling readers are associated with deficits in phonological processing (Adams, 1990; Snow, Burns & Griffin, 1998; Torgesen, Wagner & Rashotte, 1994) and poor performance on rapid automatized naming tasks (Denckla & Rudel, 1976; Wolf, 1991). Deficits in these areas develop into reading dysfluency which, in turn, negatively impacts reading comprehension (Bryne, Freebody, & Gates, 1992; Juel, Griffith & Gouch, 1986).

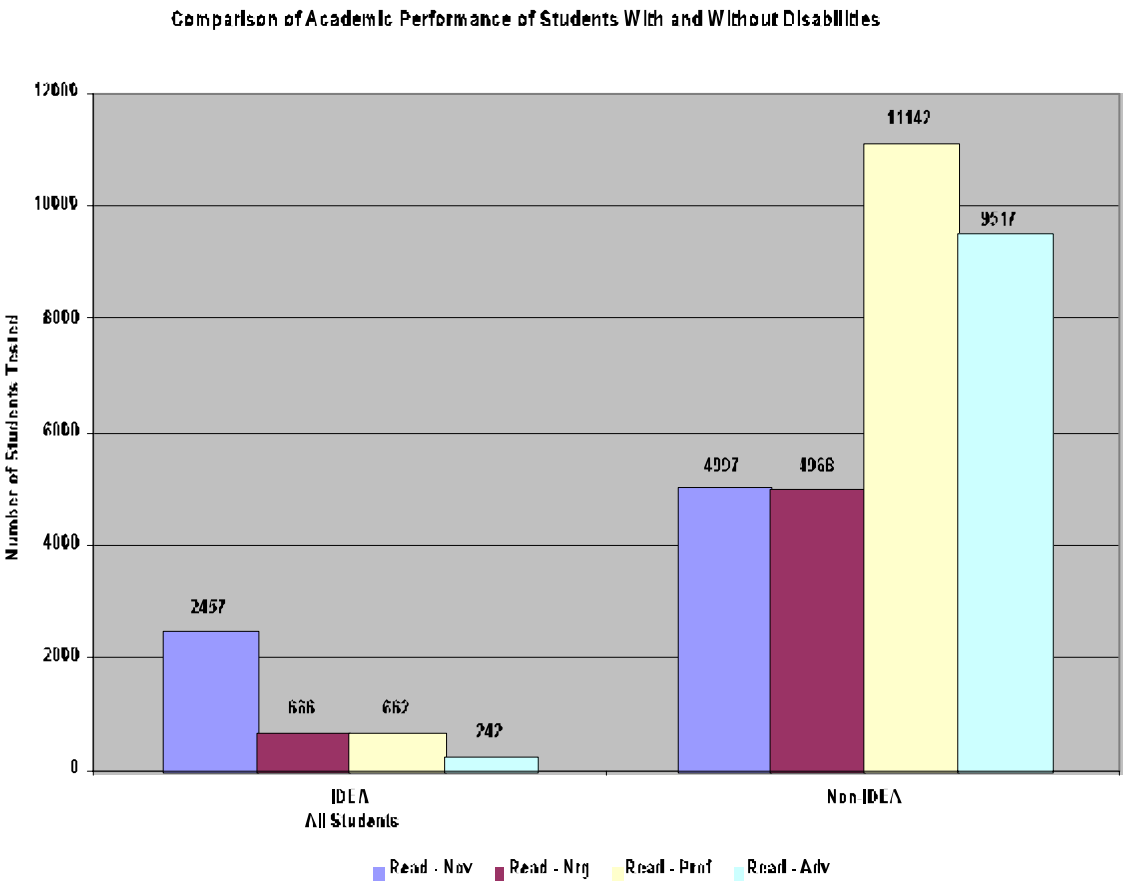
The unique and varied processing styles of students with learning disabilities, the largest proportion of identified students with disabilities, complicates the alignment between these performance deficits and intervention strategies (Chard, Vaughn, & Tyler, 2002). This has fueled years of debate, controversy, and research about approaches to intervene to improve the reading skills of these students (Swanson, 1999). A highly oversimplified summary of this information indicates that students with learning disabilities are likely to require increased

instructional intensity and duration of reading interventions (Jitendra et al., 2004). However, evidence varies across studies about the effectiveness of specific intervention models and commercially available reading curricula to result in gains for these students (Swanson, 1999).

Students with other types of disabilities present equally distinct and unique challenges in learning to read. Available research points to different approaches based on the nature of the learning difficulty (e.g., Buckley, 1995; Kliewer & Landis, 1999; Koppenhaver et al., 1991; Oelwein, 1995). A full range of programs and strategies with a track record of success with students with disabilities is not currently addressed in the scope of Reading First initiatives. Potential supplements to the current SBRR strategies include programs such as *Partner Reading* (Delquadri, Greenwood, Whorton, Carta & Hall, 1986), *Collaborative Strategic Reading* (Klingner & Vaughn, 1999), *Making Words* (Cunningham & Cunningham, 1992), and *Phonological Awareness (*Torgesen & Bryant, 1994*).* In the absence of training in these and other methods known to support results for students with disabilities, there is ample evidence that teachers are not adequately prepared to address these individualized needs of a highly diverse group of students (Mather, Box & Babur, 2001; Moats, 1994).

Reading performance data from the March, 2004 statewide assessment are available for all students in grade 4. As illustrated in Figure 3, students with disabilities are performing at substantially lower reading levels than their peers without disabilities in Montana. *There is a clear need to reduce the performance gap between students with disabilities and their peers in reading, aligning efforts with Reading First and increasing support available to teachers who provide reading instruction to students with disabilities. Special education teachers and*

reading specialists must have access to research-based information about reading interventions for students with a varying types of disabilities.



Nov = Novice; Nrg = Nearing Proficiency; Prof = Proficient; Adv = Advanced

Figure 3: Statewide Reading Performance of Students With and Without Disabilities

1.3. Early Intervening Services

The newly reauthorized IDEIA of 2004 includes language that allows LEAs to use up to 15% of their special education funds to develop and implement a coordinated system of early intervening services for students in grades K-12 who need additional academic and behavioral support to succeed in general education classrooms [Sec. 613(f)]. This funding can be used for professional development that supports teachers and other school staff to implement scientifically-based academic instruction and behavioral interventions. The idea behind this initiative is that effective interventions may enable students to be successful without having to be referred and classified as exceptional. Such systems require educators to provide early intervention to students who are struggling, match instruction to the academic needs of students, and monitor student progress with data systems that inform instructional decision-making (Fuchs & Fuchs, 1998; Fuchs, Fuchs & Speece, 2002; Heller, Holtzman & Messick, 1982).

There is considerable interest among LEAs across Montana to move in this direction, and The Montana Office of Public Instruction has entered into partnerships with The Wyoming Department of Education, The University of Montana, The University of Wyoming, and Mountain Plains Regional Resource Center to implement a pilot project focused on one form of early intervening - response to intervention (RtI). As described in a draft invitation for districts to participate (See Appendix G), the project will focus on core elements of an effective system identified by the National Research Center on Learning Disabilities. A self-assessment is being developed that will guide districts in identifying structures and resources that will be necessary in order to develop a comprehensive RtI system. *There is a need to implement a small, carefully*

evaluated initiative to understand the resources and practices that are necessary components for successful RtI programs.

While the pilot project will yield very helpful information, it will initially involve only a small number of districts. Bob Runkel, Montana's State Director of Special Education, reports that the interest in participating in this effort far exceeds the capacity of this project. Since the pilot project is a multi-year effort, it is evident that *other sources of support must be made available to meet the policy and professional development needs of the remaining districts across the state*.

1.4 Personnel Needs of Montana Schools and Teachers

For more than 25 years, the American Association for Employment in Education has identified special education personnel among the areas of greatest need in the educational field (AAEE, 2003). These findings are consistent with other research specially focused on the field of special education (e.g., Boe, Cook, Bobbitt & Terhanian, 1997; Smith-Davis & Billingsley, 1993). Results from SpeNSE, a comprehensive national study of special education personnel issues, indicate there were 69,249 job openings for special educators during the 1999-2000 school year. More than 12,000 of these openings were left vacant or filled by substitutes (Westat, 2002). Further, research has documented the "aging" of special educators currently in the classroom, suggesting that there will be increased vacancies to fill as older teachers begin to retire (Zabel & Zabel, 2001).

While personnel shortages are an issue nationally, rural areas face unique challenges relative to recruitment and retention of qualified special education personnel (e.g., Grisham-

Brown et al., 1998; Ludlow, 1998; Sauble & Rhodes, 1998; Wei et al., 1993). New teachers are often reluctant to move to rural school districts due to their isolation and lack of economic opportunities. Statewide personnel studies provide more detail about the nature and reasons for personnel shortages in Montana (Nielson, 2001, 2002). The number of job openings during the 2001-02 school year were the highest in the fields of elementary and special education. Because of low salaries, teachers completing Montana's teacher preparation programs are lured to higher paying positions by out-of-state recruiters. Nielson (2001) found that while approximately 900 students finish teacher education programs each year, only 29% of the graduates are teaching in Montana two years after finishing college.

Given these figures and trends, a focus on retention initiatives is critical. Further motivation can be found in research linking experience and student outcomes. As might be expected, inexperienced teachers have been found to be less effective than senior teachers in producing academic gains in their students (Darling-Hammond, 2000). Therefore, reducing the frequency with which students are taught by a successive stream of novice teachers is a logical approach to improving educational quality (Murnane, Singer & Willet, 1989).

Once again, there are lessons to be learned from available research about teacher attrition, stress, and burnout. Billingsley and Cross (1991) found that undesirable workplace conditions contribute to teacher attrition. A subsequent study (Billingsley & Cross, 1992) was conducted to identify factors that influence teacher commitment and job satisfaction. They found that work related variables, including role conflict, role ambiguity, and stress, are better predictors of commitment and job satisfaction than demographic variables such as age and gender.

Other available evidence indicates that teachers leave in the absence of (a) support from school leadership; (b) organizational structures and working conditions that covey respect and value; and (c) induction and mentoring programs for new teachers (Ingersoll, 2001; Johnson et al., 2001). Mentoring has been shown to be a critical piece for retention and ongoing professional development (e.g., Arenda & Rigazio-DiGilio, 2000; Boyer & Gillespie, 2000; Gold, 1996). Smith and Ingersoll (2004), for example, found that beginning teachers who were provided with mentors from the same subject field and who participated in collective induction activities, such as planning and collaboration with other teachers, were less likely to move to other schools and less likely to leave the teaching occupation after their first year of teaching.

In Montana, mentoring is a support that is evolving slowly. Legislative initiatives to obtain funding for statewide mentoring programs have been, to date, unsuccessful. The absence of state support for such a program is one factor that contributed to Montana's grade of "D+" for its efforts to improve teacher quality in Education Week's most recent "state of the states" report (Skinner, 2005). Nevertheless, discretionary and grand funds have been used for the last few years to develop pilot programs and tools for districts interested in implementing mentoring programs. These efforts represent a collaboration with the state's teachers union (MEA/MFT) and Title I program. Until more comprehensive funding for this program is available, it is critical that these collaborative efforts continue. *Current initiatives to develop mentoring programs for new teachers must be expanded to broaden access to these services, particularly for teachers in the most rural schools where recruitment and retention issues are the most serious***.**

1.5 Highly Qualified Special Education Teachers

The highly qualified requirements of NCLB and IDEIA 2004 place new and challenging demands on rural schools (Brownell, Bishop & Sindelar, 2005). Many small schools in Montana support a single special educator who provides services to students with disabilities in all grades and content areas. Becoming highly qualified in multiple core content areas presents a substantial challenge, compounded by remote locations and salary levels that make college courses economically out of reach for many teachers. Montana is in the early stages of developing its highly objective uniform state standard of evaluation (HOUSSE), and is particularly concerned about how they will support new and currently practicing special education teachers to demonstrate their subject-matter competence in multiple subject areas within the time frames established by the new IDEIA. Models from other states, as well as CEC recommendations in this area (See Appendix H) are being carefully reviewed at this time. Approaches to gain expertise and assign points to collaboratively taught core academic subjects hold considerable appeal, since co-teaching models (Bauwens, Hourcade & Friend, 1989) have been found to be an effective approach to supporting students with disabilities in general education classroom (e.g., Pugach & Wesson, 1995; Walter-Thomas, 1997). *There is a need to develop and pilot test procedures, training, and policies associated with using school-based structures such as co-teaching, as one vehicle available to special educators to become highly qualified in core content curriculum areas.*

1.6 Early Intervention Personnel

In the area of early intervention, Part C Child and Family Services Programs employ Family Support Specialists (FSS). These agencies have a difficult time recruiting staff that have the necessary skills to effectively support young children with a wide range of disabilities. Early intervention training is a high priority of the state's Interagency Coordinating Council and Comprehensive System for Personnel Development (CSPD), as there are substantial needs and weaknesses in the system that prepares and employs personnel to serve this population. Major recruitment, retention, and training issues that challenge the early intervention system are summarized in Table 5.

Table 5: Training, Recruitment, and Retention Issues for Early Intervention

Early Intervention Training Issues
Part C personnel are generically trained and not required to have formal early intervention training. Most Part C personnel lack university-based early intervention training, and Montana's Part C certification systems do not require a college degree or training in early intervention.

Part C personnel need competencies to appropriately serve children and families from culturally diverse backgrounds and living in rural regions. They need skills to provide family-centered services founded on research-based practices to people from diverse cultural groups, including American Indians, people experiencing extreme poverty, and people with strong spiritual beliefs. Further, given rural conditions, Part C personnel require skills to be able to provide services in rural communities and areas where there are few resources, both needed by the general population as well as those resources needed for young children with low-incidence disabilities.

Part C agencies have a difficult time recruiting staff with formal early intervention training. They typically can not recruit Part C personnel with early intervention and/or low-incidence disability training. Salaries are low for Part C personnel, so it is difficult to recruit applicants from states that provide such training. This also contributes to staff turnover.

Meager resources are available to support early intervention training. Montana does not have adequate resources to fully support either pre-service or in-service training. Given the current economic situation, Part C advocates are having a difficult time maintaining their current resources for early intervention training.

Training and services are influenced by low populations over large land masses with few resources. Montana is a very large and rural state which, when combined with weather variables, can make travel challenging, expensive and time-consuming.

One program exists in Montana to train professionals who go on to work in this capacity. It is run by faculty in the psychology program at The University of Montana-Missoula. To date, the program has been supported by a series of federal personnel preparation grants in the area of early intervention. Most recently, resources from the Department of Public Health and Humans Services (DPHHS), the lead agency for Part C services, and The OPI have been pooled to support the continuation of this effort as university personnel seek resources to institutionalize the program. Efforts at the University continue, and talks are underway to consider the possibility of integrating this program within a preschool early childhood program within the College of Education. While this may be a long term solution to institutionalization of this training program, there are some substantial hurdles that need to be addressed for this to become a reality. In the interim, both DPHHS and OPI believe that it is essential to support the continuation of this program while longer term solutions are being pursued. *There is a strong need to ensure the availability of training programs that produce high quality personnel to provide services to children served under Part C, and the content of this program needs to be reviewed as it addresses new areas of emphasis in IDEIA 2004.*

1.7 Project Plans to Address Needs

Critical gaps and weaknesses in the system of services and supports available to school personnel and students with disabilities have been identified. This project has been designed to address these needs through broad-based professional development initiatives. The relationship between identified needs and project plans is described in Table 6.

Table 6: Relationship Between State Needs and Project Plans

Area Of Need	Proposed Project Approach/Initiative
The demographics and geography of Montana necessitate the effective use of distance technologies and other collaborative efforts within regions in order to effectively use resources. Personnel preparation and professional development initiatives must draw upon the expertise and resources of multiple agencies.	Distance approaches to professional development are planned when appropriate; web-based resources will be developed to enable statewide access to information; regional and on-site modes of professional development are planned; a variety of subcontractors are involved in the delivery of services.
Professional development efforts are needed to support general and special educators to shift from the conception of special education as a physical place, to one of a flexible set of services that enable students with disabilities to access the general education curriculum in a manner that is consistent with their individual skills and needs.	Initiatives tied to Goal 1 are focused on increasing the understanding and capacity of general and special educators to work collaboratively so that services follow the students into the general education classroom; training on responsive instructional practices in the general education classroom is planned.

Area Of Need	Proposed Project Approach/Initiative
There is strong need to build upon the successes of this current statewide initiative. Many schools are positioned to move to higher levels of implementation and would benefit form additional forms of professional development to support their efforts while other schools, particularly at the secondary level, need to be introduced to these approaches.	The We Teach All initiative will be refined and "scaled up" in this project. Networks will be created that enable schools involved in these practices to work as a Professional Learning Community (Hord, 2004).
In efforts to expand the scale and degree of implementation of differentiated instruction in Montana classrooms, there is need to draw upon the methods of universal design as a method of reducing barriers that limit access to the general education curriculum for students with disabilities.	Training opportunities focused on this approach will be made available to schools in this initiative; information about technology resources and approaches that support this model will be shared.

Area Of Need	Proposed Project Approach/Initiative
There is a clear need to reduce the performance gap between students with disabilities and their peers in reading., aligning efforts with Reading First and increasing support available to teachers who provide reading instruction to students with disabilities. Special education teachers and reading specialists must have access to research-based information about reading interventions for students with a varying types of disabilities.	A focused effort to align efforts to address the needs of students with disabilities will be undertaken under the auspices of Montana's Reading First initiative; a reading specialist will be added to the staff of The OPI to coordinate support to schools in this area.
There is a need to implement a small, carefully evaluated initiative to understand the resources and practices that are necessary components for successful RtI programs. other sources of support must be made available to meet the policy and professional development needs of the remaining districts across the state.	Montana will participate in a pilot project with schools in Wyoming to evaluate the components, resources, and commitments necessary to sustain an effective RtI initiative at the school level. The project will be expanded in subsequent years of the grant.

Area Of Need	Proposed Project Approach/Initiative
Current initiatives to develop mentoring programs for new teachers must be expanded to broaden access to these services, particularly for teachers in the most rural schools where recruitment and retention issues are the most serious.	Project staff will collaborate with Title I and Montana's teacher union (MEA/MFT) to provide professional development opportunities and resources to implement mentoring at the local level.
There is a need to develop and pilot test procedures, training, and policies associated with using school-based structures such as co-teaching as one vehicle available to special educators to become highly qualified in core content curriculum areas.	The OPI will collaborate with Institutions of Higher Education (IHE) faculty and subcontractors to implement an approach to meeting the highly qualified core curriculum requirements through structured training and supervised co-teaching experiences.

Area Of Need	Proposed Project Approach/Initiative
There is a strong need to ensure the availability of training programs that produce high quality personnel to provide services to children served under Part C, and the content of this program needs to be reviewed that it addresses new areas of emphasis in IDEIA 2004.	Project funds will support the continuation of a preservice training program that prepares Part C personnel in research-based early intervention practices.

2.0 Significance

Letters of support from diverse stakeholder groups across Montana (See Appendix A) attest to the significance of the proposed activities for Montana educators, students, and their families. In this resource-poor state, Montanans are used to doing much with little, and the dollars associated with this grant will fund professional development activities in critical areas of intervention on a scale that otherwise would not be possible. The support and involvement of this broad base of constituencies will go far in assuring the positive impact of this project. Beyond these critical partnerships, this project has been designed with a focus on four related considerations purposefully calculated to maximize the likelihood of positive outcomes: (1) the reliance upon effective professional development practices; (2) a focus on the teacher in the context of schoolwide initiatives; (3) the use of implementation strategies that are associated

with successful efforts to scale up effective practices and bridge the gap between research and practice; and (4) an understanding of the change process as it relates to schools. The interrelationship between these areas and the likelihood of success is described in the remainder of this section.

2.1 Effective Professional Development Practices

Despite the plethora of evidence that traditional forms of professional development are ineffective (e.g., Frechtling et al., 1995; Guskey, 1986; Guskey & Huberman, 1995), many teachers continue to receive the bulk of their professional development in this manner. Conventional forms of professional development are seen as too brief and too isolated from school and classroom realities to have much impact on teacher practice. Survey data from the National Center for Education Statistics show that in 2000, most teachers received a day or less of professional development on any one content area. Not surprisingly, only 12 to 27% of these teachers felt the activity improved their teaching (NCES, 2001).

In sharp contrast to these practices, the current prevailing view of effective professional development is that it needs to be *authentic* (Boudah, Blair & Mitchell, 2003). Table 7 highlights the shift in paradigms about professional development practices that has taken place during the last 20 years.

Table 7: Paradigm Shifts in Staff Development (Sparks, 1994)

$ From individual development to individual development and organization development.
$ From fragmented, piecemeal improvement efforts to staff development driven by a clear, coherent strategic plan for the school district and school.
$ From district-focused to school-focused approaches to staff development.
$ From a focus on adult needs to a focus on student needs and learning outcomes.
$ From training that one attends away from the job as the primary delivery system for staff development to multiple forms of job-embedded learning.
$ From an orientation toward the transmission of knowledge and skills to teachers by "experts" to the study by teachers of the teaching and learning process.
$ From a focus on generic instructional skills to a combination of generic and content-specific skills.
$ From staff developers who function primarily as trainers to those who provide consultation, planning, and facilitation services as well as training.
$ From staff development as a "frill" that can be cut during difficult times to staff development as an essential and indispensable process.

In this context, the National Staff Development Council has developed a set of 12 standards that delineate the context, process, and content of high quality professional development. They are grounded in research that documents a connection between staff

development and student learning (NSDC, 2001). The complete standards and a self-assessment designed for use by school personnel is provided in Appendix I. The professional development initiatives supported by this grant will be planned and implemented to meet these staff development standards.

2.2 Schoolwide Implementation Focus

Despite the many years of efforts to improve schools and research seeking to evaluate such efforts, there is a dearth of evidence to indicate how students with disabilities are faring as a result of these initiatives (Vanderwood, McGrew & Ysseldyke, 1998). In response, Duchnowski et al (2004) utilized a rigorous case study design to examine 20 schools, all serving students with disabilities, involved to various degrees in school improvement initiatives. They were seeking to systematically describe and assess the school improvement process, examining its relationship to services for students with disabilities. They developed a School Improvement Index to measure the degree to which a school is engaged in reform and improvement activities, ensuring reference to special education and students with disabilities in the framework. In testing the utility of this index across the sample of schools, they found an important link between a school's efforts to improve, and its special education program. Schools that were more actively engaged in improvement initiatives had substantially higher ratings on items related to special education than schools less actively engaged in improvement. Further, those schools exhibiting greater relationships between special and general education also were schools more actively engaged in improvement. The authors conclude "*The special education program can be an important asset to schools in achieving improvement for all students, and this should be taken into account by*

schools when school improvement plans are being developed" (Duchnowski et al., 2004, pg. 127). Initiatives that are part of this application will be aligned with schoolwide improvement activities, taking into account the role and contribution of both special and general teachers in the success of students with disabilities.

There is an increasing appreciation of just how "key" the teacher is to student learning. While there is a logical connection between teacher behavior and student outcomes, an empirically-based understanding of the specifics of this relationship is emerging in the literature that supports the national attention that the issue of teacher quality is receiving (e.g., National Commission on Teaching and America's Future, 1996). Studies of teacher effect at the classroom level indicate that teacher effectiveness outweighs the impact of differences in class size and heterogeneity on student learning. Students who are assigned to several ineffective teachers in a row have significantly lower achievement and gains in achievement than those assigned to several highly effective teachers for consecutive years (Darling-Hammond, 2000). The results of two meta-analyses (Bloom, 1984; Fraser et al., 1987) indicate that instructional methods, assessment, and feedback regarding achievement were key variables linking effective schools and student achievement. Other studies link specific classroom practices - individualization, collaboration, and authentic assessment - to improvement in the academic performance of all students, regardless of backgrounds (McLaughlin & Talbert, 1993; Graves & Sunstein, 1992; Golub, 1988). Of particular interest is the research finding that the more professional development teachers received about working with special student populations, the less likely they were to engage in lower order (i.e., passive) instructional activities (Wenglinsky,

2002). This project will focus on supporting teachers , within the context of a school with a demonstrated commitment to change.

2.3 Adopting, Sustaining and Scaling Up Research-Based Practices

For more than two decades, much has been written about the gap between "what works", based on research, and what occurs on a daily basis in classrooms (e.g., Carnine, 1997; Huberman & Miles, 1984; Malouf & Schiller, 1995; Stanovich & Stanovich, 1997). Ball (1993) described the problem well, writing "*Those who would try to change what goes on in schools must figure out how to communicate about change in a way that makes sense and respects where teachers are and yet makes them realize that they are being asked to rethink what they do*" (pp. 257-158).

During this time, a body of knowledge has emerged that can guide efforts in translating research into effective practice. The array of factors thought to be critical for sustained use are graphically depicted in Figure 4, taken from the work of Gersten et al. (1997, pg. 468). In a later publication, these principles were incorporated into a list of Sustainability Factors and Issues (Gersten, Chard & Baker, 2000). This list of factors (See Appendix J) will be used in this project as a self-assessment to ensure professional development initiatives are designed in a way that reflects what is known sustainability as they are planned.

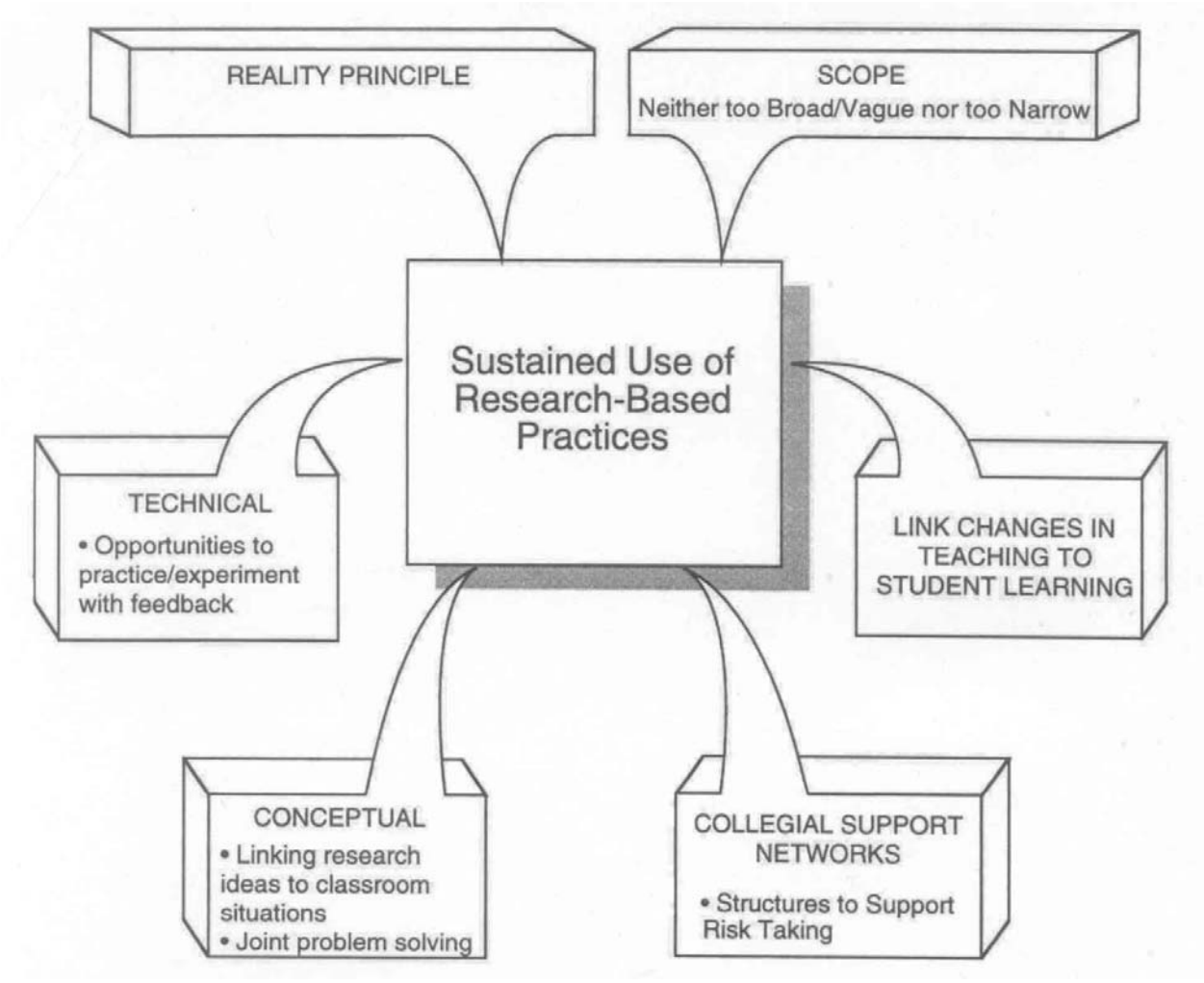


Figure 4: Factors Critical to the Sustained Use of Research-Based Practices

A recent investigation about the sustained use of a research-based practice, Peer-Assisted Learning Strategies (PALS), confirms the importance of these principles. Investigators (Baker et al., 2004) found that high quality professional development and support, the compatibility of the initiative with district and state curricular requirements, and a mechanism that allowed teachers to easily see student improvement, were critical to the sustained use and accurate implementation of PALS several years after a research project had ended (Baker et al., 2004).

"Scaling up" is a second challenge in promoting the widespread adoption of research-based practices once research-based strategies are firmly established in a given classroom/school. Scaling up is a "bottom up" model involving the testing and refinement of an innovation before expanding it to new sites (Klingner et al., 2003). While research-based information about effective procedures to scale up is relatively sparse, some guidance can be found. Available evidence suggests the following:

- Networking *across* schools can assist scaling-up efforts, providing a defined focus for improving instructional practice and mutual support in addressing implementation issues (Honig, 1994).
- The presence of a support network *within* schools has been shown to be effective in facilitating the scaling up process (Guskey, 2000; Klingner et al., 1999, 2001).
- Buy in by stakeholders at multiple levels is necessary for large-scale implementation to occur (Klingner et al., 2003). Darling-Hammond and McLaughlin (1995)describe this as "top-down support for bottom-up reform".

Initiatives designed for this project are grounded in what is currently known to be effective in rolling out initiatives on a broader scale. New initiatives will be piloted on a small scale to determine effective procedures and practices before large scale implementation is planned.

2.4 Educational Change Principles Inform Project Practice

At a time when accountability has become one of the most frequently used words in our educational vocabulary, it is appropriate that a project's significance be assessed relative to the likelihood that systemic change or improvement will actually occur as a result of project activities. Fullan (1991), discussing the construct and complexity of change in education, writes "*How can it be that so much school reform has taken place over the last century yet schooling appears pretty much the same as it's always been* (pg. 29)? Other scholars of educational reform have offered similar assessments about the effectiveness of reform efforts. Cuban (1988), for example, observed "*The ingredients change, the Chinese saying goes, but the soup remains the same*" (p.343). Eight years later, however, he disputes the myth that schools don't change, writing "*Such a myth is not only mistaken, but is also the basis for the profound pessimism that presently exists over the capacity of public schools to improve. The fact is that over the last century, there have been many organizational, governance, curricular, and even instructional changes in public schools. Such changes have been adopted, adapted, implemented, and institutionalized* (Cuban, 1996, p. 75)."

The reality is that much *has* been learned about what is necessary to create change in our schools as a result of both successful and unsuccessful efforts. Hargreaves (1997) recently summarized over a decade of study of educational change. Based on this rich body of literature, he identified nine circumstances that contribute to the failure of educational change. As Project STRIDE was being developed, these factors, delineated in Table 8, served as a valuable

benchmark in critically evaluating the integrity and comprehensiveness of project plans and procedures.

Table 8: Hargreaves (1997) Synthesis of the Change Literature

Why Change Does Not Succeed (Hargreaves, 1997, pp. viii)
Rationale. The reason for the change is poorly conceptualized or not clearly demonstrated. It is not obvious who will benefit and how. What the change will achieve for students in particular is not spelled out.
Scope. The change is too broad and ambitious so that teachers have to work on too many fronts, or it is too limited and specific so that little real change occurs at all.
Pace. The change is too fast for people to cope with, or too slow so that they become impatient or bored and move on to something else.
Resources. The change is poorly resourced or resources are withdrawn once the first flush of innovation is over. There is not enough money for materials or time for teachers to plan. The change is built on the back of teachers, who cannot bear it for long without additional support.
Commitment. There is no long-term commitment to the change to carry people through the anxiety, frustration, and despair of early experimentation and unavoidable setbacks.

Key Staff. Key staff who can contribute to the change, or might be affected by it, are not committed. Conversely, key staff might be over-involved as an administrative elite, from which other teachers feel excluded. Resistance and resentment are the consequences in either case.
Parents. Parents oppose the change because they are kept at a distance from it. Professionals can collaborate so enthusiastically among themselves that they involve the community too little or too late, and lose a vital form of support on which successful schoolwide change depends.
Leadership. Leaders are either too controlling, too ineffectual, or cash in on the early success of the innovation to move on to higher things.
Relationship to Other Initiatives. The change is pursued in isolation and gets undermined by other unchanged structures. Conversely, the change may be poorly coordinated with and engulfed by a tidal wave of parallel changes that make it hard for teachers to focus their effort.

In addition to these considerations, it is helpful to be clear about the intended scope of change to accurately assess project impact and success. Not every initiative that is part of Project STRIDE requires systemic change. Cuban (1996) offers the terminology *incremental* and *fundamental* to assist in making this distinction. Incremental changes are innovations that improve the efficiency and effectiveness of existing structures. Fundamental changes alter the

very structure or organization of a system, representing what most people think about when using the term “systems change”.

As will be detailed in the next section of this proposal, the workscope of this project encompasses both incremental and fundamental changes. Where workable structures are in place but at the present time, need to be better resourced or function in a slightly different way, project goals and anticipated outcomes represent incremental changes in the system. In the area of training, for example, Montana’s CSPD structure has been nationally recognized for its broad-based involvement of key stakeholder groups (Fishbaugh, Christensen & Bailey-Anderson, 1995). However, additional support is necessary in order to enable this structure to operate more efficiently. On the other hand, integrating the professional efforts of categorical federal programs that comprise Montana’s school reform initiatives will result in a qualitatively different infrastructure, representing a fundamental change in this system. Furthermore, this change is substantial and significant since it is not restricted to practice within the special education system.

In Table 9, key features of the approach to project implementation, addressed in more detail in the next section, are highlighted for the three project goals. This information is provided to illustrate the planful thinking and proactive steps that will be taken to increase the likelihood that this project will result in meaningful change and improvement.

Table 9: Strategic Planning Strategies Maximize the Likelihood of Positive Project Outcomes

Key Strategies to Facilitate Change
Goal 1.0 - Access to the General Education Curriculum: A clear conceptualization of the reason for change will serve as the foundation for collaborative initiative between general and special education; a long term commitment to schools will support them to reach higher levels of implementation; instructional changes will be pursued in the context of school-wide structures.
Goal 2.0 - Early Intervening Strategies: The initial scope of this initiative will be limited so that it can be carefully evaluated before efforts are made to scale it up; a commitment from school leaders will be necessary to ensure resources and support are available to school personnel.
Goal 3.0 Teacher Retention: For the initiatives in this area, a commitment of key staff at the University and school levels will be sought. Sufficient project resources will be directed toward these initiatives to ensure the availability of supports to personnel.

3.0 Quality of the Project Design

Considerable planning and input from a broad base of the educational community in Montana shaped the design of this project. A joint meeting of the state Special Education Advisory Panel and the state CSPD Council was held in October, 2004 for the specific purpose of gathering input about the needs that would be addressed by this grant. The individuals and constituencies represented at this meeting are identified in Appendix C.

Initiatives addressed in Project STRIDE are components of a larger State Personnel Plan comprised of initiatives funded by other federal programs, including Title I and II of the ESEA, Part C of IDEIA, the state's Parent Training and Information Center (Parents Let's Unite for Kids), and discretionary projects awarded to IHEs in Montana. While these coordinated efforts are described in various documents across Divisions and agencies, a brief summary of these efforts is provided in Appendix K. There is further interaction and alignment of efforts between personnel efforts in the State Educational Agency and those housed within the Department of Public Health and Human Services (e.g., vocational rehabilitation plan, independent living plan). Letters of support in Appendix A speak to the collaborative relationship and efforts across agencies, as well as the strong ties that exist between The OPI and the various state level groups that represent key educational constituencies (e.g., school administrators, principals, special education administrators, etc.).

The quality of design for this project will be demonstrated by discussing each of the following areas: (a) the project goals, objectives, and intended outcomes planned for this project; (b) the match between state needs and successful outcomes anticipated from Project STRIDE

activities; (c) the qualities of the professional development activities that ensure quality and success; and (d) the relationship between project activities and other comprehensive efforts to improve teaching and learning for student with disabilities.

3.1 Project Goals, Objectives and Outcomes

The activities of Project STRIDE are organized around 3 goals areas. The specific, measurable objectives and intended outcomes associated with each are summarized in Tables 10 through 12 below. A general approach to implementation is also described. Additional details about project activities can be found in the Management Section of this proposal and Appendix L.

Table 10: Goal 1 Objectives, Outcomes, and Approach

Goal 1. <u>Access to the General Education Curriculum</u>. Students with disabilities will have increased access to the general education curriculum.	
Objectives	**Measurable Outcomes**

1.1 Pedagogy. To provide schools with multiple avenues or support through which teachers increase their capacity to plan and deliver instruction designed to support the learning of heterogeneous groups of students.	$ Resources and consultants used by schools to increase level of implementation of responsive instructional practices $ Improved academic outcomes for students in classrooms using these instructional strategies $ Increase in time students with disabilities spend in general education classrooms
Approach to Implementation: Continued and expanded training opportunities will be available to schools focused on the skills and strategies of differentiated instruction. Networking between schools will be structured to facilitate the sharing of resources, lesson planning templates, standards-based differentiated lessons, and problem-solving. Skilled personnel within schools will be supported to serve as a resource to other schools. At the secondary level, a "high implementing" school will be supported to do outreach to schools as one strategy to further extend the influence of this initiative to the high school level. A set of tools will be developed to assist schools in identifying administrative supports necessary to scale up and evaluate their efforts relative to student outcomes.	

1.2 Reading. To provide more effective and intensive reading interventions for students with disabilities.	$ Special education teachers included in Reading First training cohorts $ Reading coaches and special education teachers increase expertise in using SBRR strategies to teach students with disabilities $ Improvement in reading performance of students with disabilities

Approach to Implementation: A reading specialist will be added to the staff in the Division of Special Education to assume responsibility for this initiative. Beginning with a new cohort of Reading First schools starting in the Fall of 2005, focused efforts to supplement the existing training to address the needs of students with disabilities who are not successful with existing reading approaches will occur. Program evaluation methods will be modified to allow for the disaggregation of students with disabilities as a means of carefully monitoring their success. Other professional development opportunities will be focused on special educators and reading teachers not associated with Reading First Schools. These activities will be implemented as a collaborative effort between The OPI and Regional CSPD Councils. Resources about effective practices will be made available statewide on a newly developed website that is part of Montana's currently funded GSEG.

Table 11: Goal 2 Objectives, Outcomes, and Approach

Goal 2. <u>Early Intervening Services</u>. To assist LEAs to implement coordinated early intervening services to support students at risk before they are referred to special education.	
Objectives	**Measurable Outcomes**
2.1 Pilot Project. To pilot and systematically evaluate training and technical assistance activities with a small number of districts to determine the necessary components for a support model for rural districts to implement an effective RtI model.	$ Level of participation and implementation of early intervening services $ Rates of referral to special education in schools implementing these services $ Clear guidelines about the time and resources required to implement a successful RtI program

<table>
<tr><td colspan="2">Approach to Implementation: A carefully designed training program has been developed by consultants working with the state of Montana, Wyoming, and Mountain Plains Regional Resource Center. At this point, information is presented across 5 full days with time between each training day to engage in "school-based assignments" that require implementation of strategies covered during training. A rigorous evaluation is planned to assist in identifying essential components of the training for larger-scale implementation in subsequent years of the grant (See Objective 2.3).</td></tr>
<tr><td>2.2 Guidance Information. To develop guidance documents for LEAs that want to implement early-intervening strategies.</td><td>$ Broad-based distribution of guidance information
$ Feedback from districts regarding clarity of information</td></tr>
<tr><td colspan="2">Approach to Implementation: Based on the experience of the Pilot Project, The OPI will develop guidance documents that assist schools in developing policies and practices that are effective and in keeping with the new IDEIA regulations when they become available. More detail will be added to these guidance materials as lessons from the Pilot Project are learned.</td></tr>
</table>

2.3 Expand Pilot Project. To refine and replicate the RtI pilot project to encompass additional LEAs.	$ Increase in level of implementation of these services (# of school involved/student impacted)
Approach to Implementation: Many schools in Montana have requested to be part of the Pilot Project associated with Objective 2.1. After the Pilot Project has been completed, additional schools will be brought into a replication of the training model. Prior to replication, any changes that are needed based on the outcomes of the Pilot Project will be integrated.	
2.4 Other PD Options. To provide an array of other professional development activities for LEAs seeking to implement early intervening services.	$ Number and variety of formats available to districts $ Degree to which districts avail themselves of these training options $ Level of implementation in these districts

Approach to Implementation: Project staff within The OPI will collaborate with subcontractors from The University of Montana to develop and implement other mechanisms to share information about early intervening services to the many districts not involved in the Pilot. Existing events such as statewide conferences and meetings, as well as distance modalities (e.g., videoconferences, web-based training) will be used as vehicles to share this information. PI Bob Runkel will address this issue in multiple forums that naturally occur throughout the school year.

Table 12: Goal 3 Objectives, Outcomes, and Approach

Goal 3. <u>Teacher Training and Retention</u>. Students with disabilities will receive instruction from well prepared special educators who are skilled in core curriculum content.	
Objectives	**Measurable Outcomes**
3.1 Mentoring. To facilitate and support schools to provide mentor programs for new special education teachers.	$ Number/proportion of new teachers supported with mentors $ Retention patterns of teachers

Approach to Implementation: A Statewide Mentor Task Force that is in place will continue its work, focusing on goals that have been established to gradually build this program. Plans include a Summer Mentor institute with differentiated content focused on skill level (beginning and advanced mentor skills), and the refinement and completion of Mentor Program Templates. These templates will be distributed to districts as a guide to use in creating their own mentor programs.	
3.2 Core Curriculum Skills. To develop professional development options that enable special educators to meet established criteria to become highly qualified in core curriculum content areas.	$ Number/proportion of teachers who meet new highly qualified standards $ Increased knowledge in core curriculum areas.

Approach to Implementation: Working in collaboration with members of the Higher Education Consortium, a pilot a program focused on newly trained special educators seeking to become qualified in multiple core content areas will be developed. IHEs will share information about the pilot with its new graduates to recruit a group of participants. Training will be made available in content area subject matter as well as in the use of co-teaching models of instruction. Special education teachers will pair with highly qualified content area teachers and will be supervised to collaboratively plan and gradually assume higher levels of responsibility for content area instruction. For-credit and other mechanisms to assign points to this activity as part of a HOUSSE system will be addressed.	
3.3 Early Intervention Training. To support the preparation of highly qualified personnel to work with children in Montana served under Part C.	$ Number of students completing specialized training $ Proportion of students securing and remaining in Part C roles

Approach to Implementation: In collaboration with the Developmental Disabilities Program of the DPHHS, The OPI will provide funding to implement a university-based early intervention personnel preparation program at The University of Montana. This is a competency-based program that includes field-based training opportunities to bridge the research-to-practice gap. Representatives of the Early Childhood subgroup of the State CSPD Council will participate in a review of the course content to assure the infusion of information about new IDEIA requirements for Part C.

3.2 Project Addresses State Needs

As described in Table 13 in the Section 1 of this narrative, there is a one-to-one correspondence between identified professional development needs in Montana and the activities of Project STRIDE. In terms of the project design, there is a similar congruence between the implementation strategies associated with these activities and the needs of Montana. Table 13 highlights implementation approaches of Project STRIDE and their responsiveness to Montana's needs.

Table 13: Relationship Between Needs and Implementation Approaches

State Needs	Responsive Approach
$ Accessible professional development opportunities	Use of distance-based approaches to deliver information; provision of on-site training, technical assistance, and follow-up as a means of providing job-embedded supports.
$ Collaborative focus on instructional strategies used by general and special educators to support access to the general education curriculum.	Purposeful selection of research-based general education approaches that are supportive of diverse learners; integration of specialized approaches (i.e., UDL) within this model; joint training of special and general educators
$ Scale up We Teach All initiative and focus on expanding its presence in secondary schools	Expand models of professional development used to support higher levels of implementation; increase focus on job-embedded training strategies

State Needs	Responsive Approach
$ More focused and intensive reading interventions for students with disabilities	Align efforts with existing Title I initiative, bringing specialized strategies into this model; provide other training opportunities to address needs of a larger number of schools
$ Support schools to direct funding to early intervening services	Model of structured training with follow-up
$ Expand availability of mentoring programs	Working within existing resources, develop tools for schools to shape their own programs
$ Address highly qualified status of special education teachers in multiple core curriculum areas	Collaborative problem-solving approach to time-sensitive issue for special education teachers; on-the-job approach to ongoing professional development
$ Make available university-based training for early intervention personnel	Collaboration across state agencies to support needed program

3.3 Effective Professional Development Practices

To be successful, staff development "*must focus on the content that teachers teach and the methods they use to teach that content, and it must be sufficiently sustained and linked to daily classroom practice to affect student learning*" (Guskey, 2000, pg. x). The professional development activities that are part of Project STRIDE have been designed with this in mind. Every objective with the exception of one (distributing guidance information about early intervening services) is congruent with these characteristics. Table 14 highlights these features relative to each area of activity. The information in this table illustrates that initiatives extend across a substantial time frame, reference what is done on a daily basis in the classroom by teachers, focus on highly specific methods used to teach diverse groups of students, and have an evaluative focus on student learning.

3.4 Linkages with Other Agencies and Organizations

As mentioned in the initial section of this grant, the relatively small number of organizations that constitute the service delivery system for students with disabilities in Montana results in a high level of collaboration in virtually any statewide initiative. Project STRIDE is no exception. The linkages with other agencies and organizations that will occur in the implementation of this project are highlighted in Table 15.

Table 15: Linkages with Other Agencies and Organizations

Goal/Initiative	Agencies and Organizations
1 - Instructional Pedagogy	ιRural Institute - University of Montana ιLocal LEAs ιOutside experts/consultants in differentiated instruction ιCSPD
1 - Reading Interventions	ιReading First personnel/regional consultants ιPLUK (parent involvement to support reading) ιMonTECH (assistive technology supports for reading) ι Early Childhood providers (Head Start/Early Head Start) ιCSPD
2 - Early Intervening	ιUniversity of Wyoming ιUniversity of Montana (School Psychology faculty) ιSEA - Wyoming ιMountain Plains Regional Resource Center
#3 - Mentoring	ιMEA/MFT ιTitle I ιLocal LEAs ιCSPD

Goal/Initiative	Agencies and Organizations
3 - High Quality/Core Curriculum	ιUniversity of Montana ιMSU-Billings ιLEAs ιCSPD
3 - Early Intervention Training	ιDepartment of Public Health and Human Services (Developmental Disabilities Program) ι University of Montana ιEarly Childhood - CSPD group

Also addressed in earlier sections of the narrative is the high level of ongoing collaboration The OPI has with a broad base of stakeholder groups. The many letters of support contained in Appendix A attest to these relationships. Furthermore, while CSPD is referenced in the previous table, it is important for the reader to understand the many constituencies that fall under this umbrella. Similarly, the state's Special Education Advisory Group was involved in initial planning of this grant, and will continue to provide input to the project by virtue of this role. A listing of current members of these groups, and the agencies they represent, is contained in Appendix C .

4.0 Quality of Project Personnel

In this section, project employment practices will be reviewed, followed by an identification of project personnel and their qualifications from the applicant agency, as well as its collaborating partners.

4.1 Nondiscriminatory Employment Practices

The state's Equal Employment Opportunity (EEO) Program was established through a Governor's executive order. The Department of Administration works with each state agency to implement and maintain an effective EEO program throughout state government. The complete policy of The Office of Public Instruction relative to EEO is provided in Table 16 below. These procedures will guide the recruitment and hiring of the new Reading Specialist position required for this project. In addition, nondiscriminatory hiring practices are required of all subcontractors to The OPI.

Table 16: EEO Policy of Montana's Office of Public Instruction

$ It is the policy of The OPI to provide equal employment opportunity to all individuals. The OPI does not discriminate on the basis of an individual's race, color, religion, creed, sex, national origin, age, handicap, marital status, or political belief with the exception of special programs provided by law.
$ The OPI will take affirmative action to equalize employment opportunities at all levels of agency operations where there is evidence that there have been barriers to employment for those classes of people who have traditionally been denied equal employment opportunity.

$ The OPI is committed to providing reasonable accommodation to any known disability that may interfere with a disabled applicant's ability to compete in the selection process or a disabled employee's ability to perform the duties of a job.
$ The OPI will not retaliate against any employee for lawfully opposing any discriminatory practice, including the filing of an internal grievance, the filing of a union grievance, the initiation of an external administrative or legal proceeding or testifying in or participating in any of the above.
$ The designated EEO Officer for The OPI is the personnel officer. The personnel officer attempts to resolve complaints of discrimination. The personnel officer is also responsible for implementation of measures designed to remediate the effects of demonstrable past discrimination within The OPI.

$ The OPI cooperates with the State of Montana Personnel Division in determining appropriate affirmative action plan items. A statement assigning responsibility for coordinating the agency affirmative action program and for attempting to resolve employee EEO complaints to a designated EEO officer and assigning responsibility for implementing the affirmative action program to all agency managers and supervisors shall be posted in each work location.

4.2 Qualifications and Time Commitments of Key Personnel

A majority of key project personnel are currently employed by the Office of Public Instruction, Division of Special Education. Project funding supports their time only to the extent that they are assuming responsibilities that vary from their current job description. This enables The OPI to assign and compensate other personnel who will pick up activities that the named project personnel will no longer be able to complete and various collaborating organizations. Other personnel are associated with organizations that will receive subcontracts to implement project activities. Abbreviated vitae for all named personnel are provided in Appendix B.

4.2.1 Key Personnel from The Office of Public Instruction

Bob Runkel will serve as the Principal Investigator for this grant. He has been State Director of Special Education in Montana since 1987. As State Director, he has overall responsibility for the delivery of special education to approximately 19,000 young children and students with identified disabilities, as well as budget responsibility for approximately $33 million dollars of State General Funds and over $11 million dollars of federal funding under IDEIA. As former President of the National Association of State Directors of Special Education, Mr. Runkel is an active and well respected state director. With a keen understanding of both the needs of Montana, as well as national trends, he is valued for his ability to work collaboratively to design solutions to Montana's service delivery challenges that are well suited to the individual character of this state. From his strong position of leadership within The OPI, his oversight and vision for this project will be critical to its success. The time he will devote to this project will not be supported with project funding.

Susan Bailey-Anderson currently serves as Project Director for the Montana's State Improvement Grant, and will serve in the same capacity for Project STRIDE. She will devote .50 FTE to this project. Her other existing responsibilities, including oversight of Montana's Comprehensive System of Personnel Development (CSPD), member of the Teacher-Education Standards Review Committee, and representative from OPI on many other inter-agency efforts, are a natural fit with the scope and focus of this project. She has worked at OPI since 1987. Like Mr. Runkel, her familiarity with all aspects of special education services in the state is unmatched. Further, they are both held in extremely high regard by practitioners across the state.

It is this experience and positive relationships that contribute to the high levels of voluntary collaboration between state and local educational agencies that characterize much of how things are accomplished within this state.

Dick Trerise currently serves as Project Coordinator for Montana's State Improvement Grant. Mr. Trerise has been at The OPI for two years, coming to the state agency with experience as a teacher, school principal, and superintendent. He brings a school-wide, general education perspective to issues of school change and professional development. This is a critical perspective in the design of initiatives focused on improving the teaching and learning of students in both general and special education. Mr. Trerise will serve as Project Coordinator for Project STRIDE, and will devote full time to this effort.

Floy Scott is currently a Research Analyst for the Division of Special Education of The OPI, working half time in this capacity. She is also currently a graduate student in Sociology at The University of Montana, trained in both quantitative and qualitative research methodology. Ms. Scott has worked in various capacities at The OPI since 1991, all focused on the area of data analysis. She successfully coordinated a General Supervision and Enhancement Grant that was focused on improving the data systems within The OPI, positioning the Division to adopt an individual student level tracking system. She also performs the data analysis required for Montana's Annual Performance Report to the U.S. Department of Education and other federal reporting requirements. Ms. Scott is well positioned to access statewide data needed to evaluate project activities, and has the skills necessary to develop and use other data sources and methodologies to perform a comprehensive evaluation of Project STRIDE. Ms. Scott will

devote .20 FTE to activities of this project that are beyond the scope of her current duties. She currently does data analysis in her assigned role, and will devote time beyond that supported by this project to these activities.

Nikki Sandve is currently a Program Specialist in the Division of Special Education at The OPI. Her current duties encompass monitoring, professional development, and the coordination of mentoring activities that have been implemented over the past few years. This project will support .10 FTE for her efforts relative to the mentoring initiative. Like Ms. Scott, there will be overlap between her current role and project activities, and the grant will not support that portion of her time, although the project will benefit from these efforts.

Debbie Hunsaker is Montana's Reading First Director. While this project will not support any of her time, the alignment of efforts between this project and Reading First will result in her focusing time and attention to our efforts to ensure that the needs of students with disabilities are being addressed in this statewide project.

Reading Specialist, to be named. The Office of Public Instruction does not currently have anyone with reading expertise among the staff members of The Division of Special Education. Given the prominence of the reading initiative within Project STRIDE, it will be necessary to create a position with this focus for the purpose of this grant. The OPI will follow existing recruitment and hiring procedures in order to assure fairness and equity in this process. Recruitment will begin immediately if this grant is funded, with the intent of having the position filled as close to the beginning of the Fall semester of the 2005-06 school year as is possible.

Karen Jeschke, Administrative Support. Ms. Jeschke currently provides administrative support for Montana's State Improvement Grant. She will continue in that capacity for Project STRIDE on a full time basis.

A summary of the time commitments of key OPI personnel for this project is provided in Table 17. Brackets surround estimated FTEs for personnel whose time on this project is being supported by other sources.

Table 17: Summary of Time Commitments of Key Personnel

Name	Project Role	FTE
Bob Runkel	Principal Investigator	[.05]
Susan Bailey-Anderson	Project Director	.50
Dick Trerise	Project Coordinator	1.00
To be hired	Reading Specialist	1.00
Nikki Sandve	Program Specialist	.10
Floy Scott	Project Evaluation	.20
Debbie Hunsaker	Reading First Director	[.10]
Karen Jeschke	Administrative Support	1.00
TOTAL FTE:		**3.95**

4.2.2. Qualifications of Project Subcontractors

Subcontracts for project activities will be awarded to MSU-Billings, The University of Montana Rural Institute, The University of Montana Department of Psychology, and Parents Let's Unite for Kids (PLUK). Qualifications of personnel within these organizations are highlighted next. Abbreviated vitae for these personnel are provided in Appendix B.

At **MSU-Billings**, Dr. Linda Christensen and Dr. Mary Susan Fisbaugh will devote time to Project STRIDE activities. Their involvement is focused on activities tied to Goal 3, teacher training and retention. They will be part of a team of people who develop professional development options that enable special educators to meet established criteria to become highly qualified. This involves work with Montana's Higher Education Consortium (see Resources section) to link efforts to preservice training, as well as supporting efforts to implement a pilot project that will lead to the development of procedures and policies to document the competence of special education teachers in multiple core curriculum areas.

Both Dr. Christensen and Dr. Fishbaugh are senior faculty at MSU-Billings, both have served as Department Chairs, and both have a long record of collaboration with The OPI on state personnel initiatives, including the ongoing special education endorsement project and coordination of the activities of the Higher Education Consortium.

At the **University of Montana's Rural Institute**, Dr. Gail McGregor will support activities tied to the We Teach All and Universal Design for Learning initiatives, and will also work collaboratively with Floy Scott on project evaluation activities. Dr. McGregor is a Research Professor with both teaching and funded grant project responsibilities. She has a long

history of involvement with OPI, and will lend expertise in the area of inclusive pedagogy (McGregor & Vogelsberg, 1998) for the two initiatives. Having previously worked in an evaluative capacity for Montana's State Improvement Grant and many other federally funded projects, she brings experience in multiple evaluation methodologies that are planned for this project.

Two faculty members from the **University of Montana's School of Psychology** program, Dr. Kelli Cummings and Dr. Margaret Beebe-Frankenberger will be involved in the training tied to the Early Intervening project goal. As reflected in their vitae, both are well trained, published, and experienced in early intervening services, and will provide training associated with the pilot RtI initiative. Another psychology faculty member, Susie Morrison, will teach the early intervention coursework supported by project funds.

Parents Let's Unite for Kids (PLUK) will receive a subcontract to support efforts tied to Goal 1. They will implement an initiative specifically focused on parent support of academic initiatives for students with disabilities at home. Dennis Moore, Executive Director of PLUK, will oversee this initiative within his organization. Mr. Moore has served in the role of Executive Director for a number of years, and is highly visible statewide. Under his leadership, PLUK has expanded its regional infrastructure, with parent consultants available to families regardless of their location. As will be described in more detail in the Resource section, PLUK is also well known for its electronic newsletter highlighting statewide training events, and its use of distance modalities to deliver training to both parents and professionals.

5.0 Adequacy of Resources

In this section of the narrative, the resources that the applicant and its collaborators bring to this project will be highlighted. In addition, the commitments and nature of involvement of each partner, adequacy and cost-effectiveness of the project budget, and potential for continued support is described.

5.1 Resources of Applicant

As an integral part of the work of the Division of Special Education, the resources available to employees at OPI are available to support the efforts of this project. Basic project resources include: accessible facilities for offices, meetings, workshops, and conferences; fully furnished office space for project personnel; IBM-compatible computers and access to high-quality laser printers; direct connections to the internet; access to media and graphic capabilities; toll free 1-800 telephone access and TDD access; high-quality copying equipment and printing services; and distance telephone conference capabilities.

Computer technology supports within the state agency are critical to the success of this project. OPI utilizes a number of distance-learning modalities to deliver training and interact with local districts statewide. Web resources and video streaming capabilities will be critical supports for professional development activities of Project STRIDE.

Perhaps the greatest resource that OPI has readily available for this project is direct proximity to all key personnel responsible in the various Divisions whose collaboration is essential to the success of this effort. Of particular importance for the activities of this project are the relationships with personnel working with Title I, including Reading First and

Comprehensive School Reform activities, and Title II, including accreditation and 5 year planning initiatives. This proximity and familiarity will be necessary for the success of aligned initiatives across Divisions that compliment rather than replicate services to schools.

Beyond the resources within the state agency, current structures and other relationships that are critical to the success of this initiative merit mention.

5.1.1 Comprehensive System of Personnel Development

In addition to having a state CSPD council, Montana is divided into 5 regions for the purpose of its Comprehensive System of Personnel Development. Each region has a CSPD Council that is comprised of diverse stakeholders (e.g., general educators, special educators, family members, higher ed personnel). These Councils have the responsibility of identifying professional development needs within their region. With an annual allocation of dollars from OPI, they then plan activities to respond to these needs. Activities range from Summer Institutes to school planning dollars to stipends for people attending training out-of-state. This design is very effective in Montana, representing a cost-effective way to respond to the unique needs of each part of the state (Fishbaugh, Christensen & Bailey-Anderson, 1995).

There is strong commitment among the regions for this approach, capitalizing upon Montana's tradition of active involvement and locally-driven decision-making. As indicated in letters in Appendix A, Regional Council personnel are aware and supportive of the goals and activities encompassed in this project. High levels of collaboration can be expected between these entities and the various initiatives encompassed in Project STRIDE.

5.1.2 Higher Education Consortium

An offshoot of the state CSPD Council, the Higher Education Consortium, consists of faculty from every college and university in the state that is involved in teacher preparation. The OPI supports this group, funding two meetings per year during which members work on statewide issues such as transferability of credits between campuses, improved approaches to prepare general education teachers to respond to student diversity when they get into the field, and more recently, issues related to the preparation of highly qualified personnel. The ongoing relationship with this group and between group members will be critical to efforts addressing the professional development issues identified in this grant at the preservice level, as well as, with teachers already in the field.

5.1.3 GSEG Professional Development Infrastructure

Montana was successful in receiving funding for a General Supervision and Enhancement Grant (GSEG) focused on improving the state's infrastructure for professional development, achieving a greater alignment of professional development activities across federal programs. While still in the early stages of implementation, this project is focused on creating a more coordinated and regionally responsive technical assistance and information dissemination system in Montana. Unlike many other states, no such infrastructure currently exists, and the planning and discussions necessary to bring together research from various Divisions within The OPI are currently underway.

Two specific structures will be created in conjunction with this grant that will be valuable for this effort. First, the development of an accessible website that represents a "one stop shop"

for professional development and technical assistance information for MT schools is underway. This will provide a centralized vehicle to disseminate information about opportunities and activities tied to the various initiatives of this project. Second, personnel at The University of Montana Rural Institute are involved in synthesizing information about research-based strategies to improve student learning outcomes, aligned with Montana priorities and curriculum standards. This information will be readily available to schools on this new website. This supports efforts of Project STRIDE to promote the use of research-based practice to improve outcomes for students with disabilities.

5.2 Resources and Commitment of Partners

The two collaborating universities (MSU-Billings and the University of Montana) and the state's parent training and information center have resources and expertise available to lend to this project. Letters of support and commitment from all partners involved in a subcontract can be found in Appendix A.

At MSU-Billings, experienced faculty are available to participate in efforts to support teachers to become highly qualified in core content areas. Further, these faculty are in a position to address teacher quality issues at the preservice level and are experienced in the use of distance technologies to enable access to instruction for individuals outside of their immediate region.

At the **University of Montana**, one subcontract goes to the Rural Institute, Montana's Center for Excellence in Disabilities funded by the Administration on Developmental Disabilities. With a staff of approximately 75 employees and over forty funded projects

covering the full array of service areas associated with individuals with disabilities, resources are available to support the activities tied to this subcontract workscope.

The Rural Institute has used various distance education approaches to provide graduate coursework off campus for many years. A Technology Director oversees a staff of four computer support technicans who are available to address the technology needs of Rural Institute staff. The items described in Table 18 represent a substantial commitment on the part of the Rural Institute to distance-based forms of training and support, a necessity given the statewide mission of the Institute and the rural geography of the state.

Table 18: Technology Infrastructure at the Rural Institute

Component	Description
Multi-Site TCP/IP-Based Video Confer-encing, with Fully Interactive Real-Time Collaboration Capacity	A First Virtual Communications *Meeting Point Multi-site Video Conferencing Server* has been being installed for use on an in-state and national basis to link various types of students, consumers, educators, and other professionals over the internet. These real-time interactions will be used for training, coordination, consultation, TA, and networking. This tool has the capacity for full real-time collaboration, permitting participants in the video conference the opportunity to mutually share and modify documents, present interactively through whiteboards, transfer files, and run digitized audio and video media.

Component	Description
Lotus Learning Space, Asynchronous & Synchronous Course Platform	A product of IBM *MindSpan,* this innovative platform is employed almost exclusively by the private sector to provide training and technical assistance either anytime or synchronously, using "live" session scheduling and server tools. This server takes advantage of an integrated Oracle database, giving it the capacity to function more like an interactive electronic library of training courses, modules, and materials than like a conventional course platform such as *WebCT* or *BlackBoard.*
DISCUS Threaded Discussion Server, with Broad-Based Function Capacity	DISCUS is the preferred platform for threaded discussion for education, human services, and the private sector. It provides a great deal of flexibility in the design and facilitation of anytime discussions or events. In addition to traditional discussions, this server will be used to host guest/expert presentations, provide consultation and technical assistance at a distance, conduct training, and serve as a means for cooperative planning and collaboration.

Component	Description
Live and Asynchronous Streamed Video and Audio Server	This server meets multiple goals for the Institute. It provides a means to stream critical demonstration and training media to remote parts of the state and country, at access rates consistent with current rural bandwidth capacity. These media files will also be accessible during synchronous events, such as video conferencing, to further augment effectiveness. The server will be linked to Lotus Learning Space, so that all media can be accessed for training, or on an "on-demand" basis during live sessions. Lastly, the server will employ state-of-the-art cataloging and archival software so that online retrieval will be functionally instantaneous.
Digital Video Development and Production	Two sites, the Institute classroom, large group meeting room, and a "to-be-designed" studio are being modified to serve as studios. They will permit live, streamed transmission of training and other events from CHC. These resources will be employed to create digitized video that will be processed for later streaming. A specialized Macintosh G4 video digitizing workstation has been set up and dedicated for this purpose.

A second critical resource at the Rural Institute is the MonTECH Project, the statewide technology related assistance program funded under the Tech Act. The project has an equipment loan program, provides evaluations, and has training resources that are particularly valuable for the Universal Design for the Learning initiative of Project STRIDE. Dr. Gail McGregor is the

Director of the MonTECH project, and is in a position to easily access these resources for the purposes of this project.

Parents Let's Unite for Kids also has considerable resources to contribute to this effort. People across the state look to PLUK's online newsletter as a resource for information about training events focused on the needs of students with disabilities. Like the Rural Institute, PLUK also has a sophisticated technology infrastructure to support distance approaches to training. Finally, it's network of regional parent consultants is essential to ensuring the involvement of families in the various initiatives of this project.

5.3 Resources Adequate and Reasonable

A detailed description of all of the costs tied to this project is provided in the Budget Narrative section at the front of this proposal. The budget has been thoughtfully put together to target specific areas of identified weakness in the delivery of services to students with disabilities. As specified in the RFP, subcontracts are in place with institutions of higher education (MSU-Billings, The University of Montana-Missoula) and PLUK, the parent training center in Montana. Cost effectiveness is evaluated by comparing expenses with anticipated outcomes.

In Montana, where resources are limited, a little goes a long way. This is evidenced in this plan in terms of the number and significance of initiatives that are supported with project funding. Federal funds will expand the scope and impact of ongoing school improvement initiatives, but will not support the basic initiatives themselves. In this way, the project builds upon the resources and expertise of existing structures and personnel in the state, leveraging discretionary grant dollars to produce both the incremental and fundamental changes necessary to improve outcomes for students with disabilities in Montana.

5.4 Potential for Continued Support

While all states are facing dire fiscal circumstances at this time, there are several factors that contribute to the potential for continued support of the initiatives of this project. First and foremost is the evidence that will be gathered about the outcomes of these training initiatives. If successful, professional development resources that continue to be available to the state and schools from other sources are likely to be directed toward efforts with a track record of

effectiveness. This includes discretionary dollars the state receives under IDEIA, as well as funds tied to professional development under Title I and Title II of the ESEA. In Montana, many of these dollars flow directly to districts, so they will be in a position of allocating them as they wish. Previous involvement in effective initiatives in areas such as reading, instructional methods, and early intervening, are likely to be areas of continued focus for the future.

6.0 Quality of Management Plan

In this section, the organization and general operating procedures of this project are described. This includes the planned approach to management and monitoring of project activities, and the distribution of responsibilities across project staff and subcontractors. The strategies planned to ensure broad-based input which will assure attention to a diversity of perspectives about the operation and accomplishments of the project, are also identified.

6.1 OPI Organizational Structure

The organizational structure of The OPI is graphically depicted in Figure 5 on the following page. The efforts of this project will be aligned with ongoing professional development activities within Division of Special Education, Accreditation, and Educational Opportunity and Equity. (See State Initiatives summarized in Appendix K). For purposes of organization, Project STRIDE would replace the State Improvement Grant currently identified as an activity of the Division of Special Education. This grant will end June 30, 2005.

Division Administrator Bob Runkel serves as the Principal Investigator for this grant. Following the existing OPI management structure, the supervision of the other named OPI staff for this project is distributed between Marilyn Pearson, Assistant Director, and Bob Runkel. As Project Director, Susan Bailey-Anderson will oversee and supervise the agreements between The OPI and all subcontractors. As full time Project Coordinator, Dick Trerise will be responsible to the day to day management of the project.

6.2 Achieving Project Objectives On Time and Within Budget

The project will use a management system based on Hinrichs and Taylors (1969) Planning-Programming-Budgeting System (PPBS) to monitor the project's accomplishments and expenditures. This system is supported by software tools such as Microsoft Project Manager. The PPBS has proven to be an effective tool for continuous managerial performance feedback and oversight for daily management and decision-making. It facilitates effective project management at all project levels and promotes ongoing project evaluation so activities and resources (fiscal and personnel) can be redirected when needed. The project's evaluation system (see Section 7) is built into and facilitates the effectiveness of the PPBS for project management and helps to ensure ongoing feedback and continuous improvement of project operations.

Steps in the PPBS are as follows: **1)** Project objectives are specified, analyzed, and based on the project's goals. **2)** Activities are analyzed and specified for each objective. Alternatives and *budgets* for accomplishing objectives are explored to determine effective and economical methods for achieving the goals. Preferred combinations are selected as project activities. *Project personnel determine responsibility assignments for activities and establish timelines.*

These activities, responsibility assignments, and timelines guide project implementation and become the basis for determining performance status and providing feedback for continuous improvement. Activities may be added, redefined, or dropped if project evaluation indicates alternative action is required. **3** Implementation of project goals, objectives, and activities is initiated and monitored weekly through project meetings and individual reporting. Minor adjustments are made and communicated across project personnel. **4)** Quarterly progress checks evaluate program status and accomplishments by **a)** monitoring status of activities planned and completed. Activities scheduled but not completed are evaluated to determine appropriate actions; **b)** determining the percentages of activities in progress or accomplished; and **c)** monitoring the timelines of each implemented activity. Reallocation of resources/budget will occur, if necessary, and the progress reports will help determine if corrective management is necessary. **5)** Recommendations from the above evaluation component are communicated across project personnel-partners and implemented. Project activities that continue unchanged, loop again through Steps 3, 4 and 5 (above). If activities/timelines need to be modified, the loop will begin at Step 2 (above) and loop through Step 5.

The PPBS will also serve as the vehicle to evaluate, with project personnel and partners, the project's goals, objectives, activities and budget at the beginning of each project year. This will ensure that the project remains responsive to the steps necessary to accomplish the goals and outcomes. The PPBS provides the mechanism to ensure that information and feedback is communicated across all project partners, and is designed to promote continuous improvement in project operations.

The project's goals, objectives, and outcomes are delineated in Section 3.1 of this narrative. The timelines and responsibility assignments for each objective for the five year period is detailed in Table 19. Responsibility assignment codes for this table are as follows: **PI** - Principal Investigator (Runkel); **PD** - Project Director (Bailey-Anderson); **PC** - Project Coordinator (Trerise); **RS** - Reading Specialist; **PS** - Program Specialist (Sandve); **CSPD** - State/Regional Councils; **EV** - Evaluators (Scott/McGregor); **RI** - The University of Montana Rural Institute Subcontractor; **PSY** - The University of Montana Psychology Department Subcontractors; **MSU-B** - MSU-Billings Subcontractors; **PLUK** - Parent Training and Information Center; **LEA** - local school districts. There is an assumption that project evaluation personnel will be tied to all initiatives. A more detailed analysis that identifies activities is provided in Appendix L.

Table 19 : Project Goals, Responsibility Assignments, and Timelines by Years

Goal 1: Access to the General Education Curriculum. Students with disabilities will have increased access to the general education curriculum.					
Objectives	**Responsibility and Timelines by Years**				
1.1 To provide schools with multiple avenues of support through which teachers increase their capacity to plan and deliver instruction .	PD, PC, RI, LEA				
	2005			2008	2009

Goal 1: Access to the General Education Curriculum. Students with disabilities will have increased access to the general education curriculum.	
	x x x x x x x x x x x x x x x x x x x x
1.2 To provide more effective and intensive reading interventions for students with disabilities.	PD, RS, LEA
	2005 / 2008 / 2009
	x x x x x x x x x x x x x x x x x x x x
Goal 2: Early Intervening Services. To assist LEAs to implement coordinated early intervening services to support students at risk before they are referred to special education.	
2.1 To pilot and systematically evaluate training and technical assistance activities to determine necessary components for an effective RtI model.	PSY, LEA, PC
	2005 / 2008 / 2009
	x x
2.2 To develop guidance documents for LEAs that want to implement early intervening strategies.	PI, PC
	2005 / 2008 / 2009

Goal 1: Access to the General Education Curriculum. Students with disabilities will have increased access to the general education curriculum.	
	x x x
2.3 To refine and replicate the RtI pilot project to encompass additional LEAs.	PSY, LEA, PC 2005 2008 2009 x x x x x x x x x x x x
2.4 To provide an array of other professional development activities for LEAs seeking to implement early intervening services.	PI, PC, PSY 2005 2008 2009 x x x x x x x x x x x x
Goal 3: Teacher Training and Retention. Students with disabilities will receive instruction from well prepared special educators who are skilled in core curriculum content.	
3.1 To facilitate and support schools to provide mentor programs for new special education teachers.	PS, PC, LEAs 2005 2008 2009

Goal 1: Access to the General Education Curriculum. Students with disabilities will have increased access to the general education curriculum.																				
		x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
3.2 To develop professional development options that enable special educators to meet established criteria to become highly qualified in core curriculum content areas.	MSU-B, PD, RI, LEA																			
	2005												2008				2009			
		x	x	x		x	x	x		x	x	x		x	x	x		x	x	x
3.3 To support the preparation of highly qualified personnel to work with children in Montana served under Part C.	PSY																			
	2005												2008				2009			
	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x

6.3 Diversity of Perspectives

The OPI enjoys a level of personnel involvement with stakeholder groups that is difficult to achieve in more populated states. It is "business as usual" for practitioners from the field to be actively engaged in guiding and responding to the efforts of The OPI. That is reflected in the multi-level (state/regional) CSPD structure that is highly visible in the state. Similarly, the state's Special Education Advisory Group, with it's required representation, is kept apprised of all

initiatives of The OPI during quarterly meetings and ongoing electronic communication. The broad-based representation on the CSPD Council and Special Education Advisory Panel can be seen in the listing of stakeholder groups contained in Table 20.

Table 20: Stakeholder Groups Participating in State Level Advisory Groups

Stakeholder Group	State CSPD Council	Special Ed Advisory Panel
general education teachers	Y	Y
special education teachers	Y	Y
administrators	Y	Y
parents	Y	Y
paraeducators	Y	
special education cooperatives	Y	
IHEs	Y	Y
Regional CSPD chairs	Y	
state agency personnel	Y	Y
private school representatives	Y	Y

Stakeholder Group	State CSPD Council	Special Ed Advisory Panel
legislators		Y
business community		Y
juvenile & adult corrections		Y
teacher unions	Y	
adult service providers	Y	
MT Speech & Hearing Assoc.	Y	
school boards	Y	
school psychologists	Y	
Part C	Y	

7.0 Quality of Project Evaluation

Patton (1986) describes program evaluation as "*the systematic collection of information about the activities, characteristics, and outcomes of programs for use by specific people to reduce uncertainties, improve effectiveness, and make decisions with regard to what those programs are doing and affecting* (pg. 14). Project evaluation activities will be implemented by a team comprised of Floy Scott, Research Analyist for the Division of Special Education of The OPI, and Dr. Gail McGregor, Research Professor at The University of Montana. Ms. Scott is

well versed in the data systems of The OPI, and presently performs the data analysis required to produce Montana's Annual Performance Report. This familiarity and access to systemwide data will be essential to the success of evaluation efforts. Dr. McGregor has conducted evaluations of many federally funded projects, and will lend her expertise about measurement of school reform and professional development initiatives to this effort. Together, this team has the ability and resources to implement the comprehensive evaluation that is described in the remainder of this section.

7.1 Project Evaluation Methods

The design of this project is influenced by two models of evaluation. The first is the Results and Performance Accountability model developed by Friedman (2005), currently being used to evaluate State Deaf-Blind Projects funded by The Office of Special Education Programs. The second source of influence is Guskey's (2000) guidelines for evaluating professional development. Thomas Guskey is a well recognized leader in the staff development field, having published extensively in this area for many years. Application of the approaches derived from these two models leads to a comprehensive and feasible plan for gathering evaluative data about project activities.

The Results and Performance Accountability is based on the concepts of *effort* and *effect*, and their interaction with the variables of *quantity* and *quality*. The graphic in Figure 6 illustrates this relationship.

	Quantity	**Quality**

Effort	What did we do?	How well did we do it?
Effect	*Is anyone better off as a result?*	

Figure 6: Overview of Performance Accountability Model

Applied to a multi-faceted project such as this, these questions generate a range of potential questions and measurement activities. Several in each area are suggested in Figure 7.

<table>
<tr><td></td><td>Quantity</td><td>Quality</td></tr>
<tr><td>Effort</td><td><u>What</u> did we do?
$ #activities
$ #participants
$ coverage/expansion</td><td><u>How well</u> did we do it?
$ Efficiency measures
$ Satisfaction measures
$ Level of implementation</td></tr>
<tr><td>Effect</td><td colspan="2">Is anyone better off as a result?</td></tr>
<tr><td></td><td>Effects on:
$ teachers
$ students
$ schools
$ families</td><td>Degree of change in:
$ knowledge
$ skills
$ attitudes
$ behavior
$ learning</td></tr>
</table>

Figure 7: Application of Performance Accountability Model

While Friedman's model is intended as a broad-based approach to program evaluation, Guskey's discussion of evaluation focuses exclusively on professional development. His approach conceptualizes professional development measurement and impact at 5 levels. While the complete model is provided in Appendix L, Table 21 identifies five levels of evaluation and potential questions associated with each.

Table 21: Guskey's (2000) Professional Development Evaluation Model (pgs. 79-81)**.**

Evaluation Level	Examples of Questions Addressed
1. Participant's reactions	$Did they like it? $Was their time well spent? $Did the material make sense? $Will it be useful? $Was the leader knowledgeable and helpful?
2. Participants' learning	$ Did participants acquire the intended knowledge and skills?
3. Organization support and change	$ What was the impact on the organization? $ Did it affect organizational climate and procedures? $ Was implementation advocated, facilitated, and supported? $ Was the support public and overt? $ Were problems addressed quickly and efficiently? $ Were sufficient resources made available? $ Were successes recognized and shared?

Evaluation Level	Examples of Questions Addressed
4. Participant's use of new knowledge and skills	$ Did participants effectively apply the new knowledge and skills?
5. Student learning outcomes	$ What was the impact on students? $ Did it affect student performance or achievement? $ Did it influence students' physical or emotional well being? $ Are students more confident as learners?

A consideration of these two perspectives on evaluation has led to the development of an *initial* evaluation plan, detailed in Table 22 on the following pages. This plan will go through additional refinement before it is implemented, allowing for the input of others and further exploration of tools and data sources that lend themselves to this context. The descriptive labels assigned to project objectives are used in this table to facilitate readability. The reader is referred back to Tables 10-12 for complete objective statements.

Project evaluation personnel will provide others with the necessary tools, and, as necessary, training, to collect evaluation data in situations where data source do not currently exist. Data will be sent to evaluators for entry, compilation, and analysis. Wherever appropriate, results will be returned to project participants to guide their future actions. For example, student outcome data associated with reading interventions will be shared with school personnel so that this information can inform future instruction.

7.2 Evaluation of Effectiveness of Project Implementation Strategies

In both Guskey's and Friedman's evaluation model, a focus on project effectiveness is considered. *Did project activities result in meaningful change? Is anyone better off as a result of these activities?* As summarized in Table 22, this aspect of evaluation was incorporated in the following ways:

Goal 1: Measures include gains in teacher knowledge and skills, organizational support for responsive classroom practices, and improvements in learning outcomes tied to reading and instruction in content that is taught in classrooms implemented a differentiated instruction approach to teaching.

Goal 2: Evaluation plans incorporate effectiveness measures in considering gains in teacher knowledge and skills, organizational support for RtI practices, improved student learning outcomes, and changes in referral rates to special education.

Goal 3: Anticipated measures associated with this goal include acquisition and application of new knowledge and skills by teachers, organizational support for mentoring, retention patterns, and acquisition of new skills in core content areas.

7.3 Quantitative and Qualitative Outcome Data

A review of the evaluation data that will be collected (see Table 22) indicates that both quantitative and qualitative sources of data will be gathered. Furthermore, data will be collected from multiple sources to create a rich picture about the effectiveness of project activities from different perspectives. This includes students (e.g., performance outcomes), teachers (e.g., teaching behaviors; self-assessments) and schools (e.g., changes in structures, climate, procedures). Finally, repeated measurement schedules will enable impact to be assessed over time. Collectively these data will provide a picture about the focus areas of this project that has both breadth and depth.

7.4 Formative Use of Evaluation Data

Data will be gathered in a formative manner to inform project planning and assist in decision-making. Project staff and subcontrators will use the PPBS management system described in Section 6 of this proposal. This system involves a monthly review of accomplishments and expenditures to ensure that project activities are on track and within budget. This also provides an opportunity to review outcome data that are being collected on a regular basis, rather than waiting long periods of time to review accomplishments and, perhaps, miss important opportunities to make necessary adjustments in implementation strategies to improve outcomes. Data from individual project initiatives will be shared with project evaluators on an established schedule, allowing for review and feedback on a regular basis.